Traffic User Manual

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GETTING STARTED

Starting Traffic

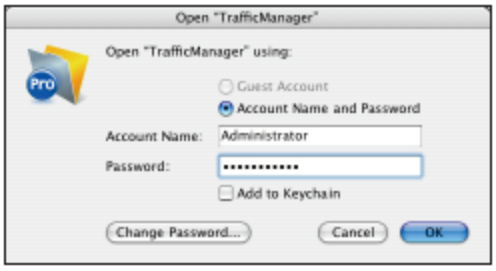
To log into Traffic, click on the Traffic opener button on your desktop. As new versions of Traffic are released, this button may change in appearance. The newest icon looks like this:

TrafficOpener

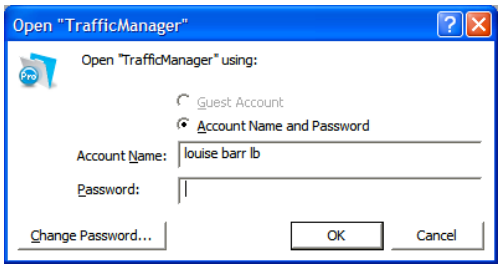
You will need to type in your Account Name, which is your first name and surname, followed by your two initials. In some cases (such as in similar names), a variation of your initials may be used, and your Traffic administrator will tell you if this is the case. e.g. **John Smith JS.**

Next you will need to type in your password, which is case sensitive.

The Mac login screen:



The PC login screen:

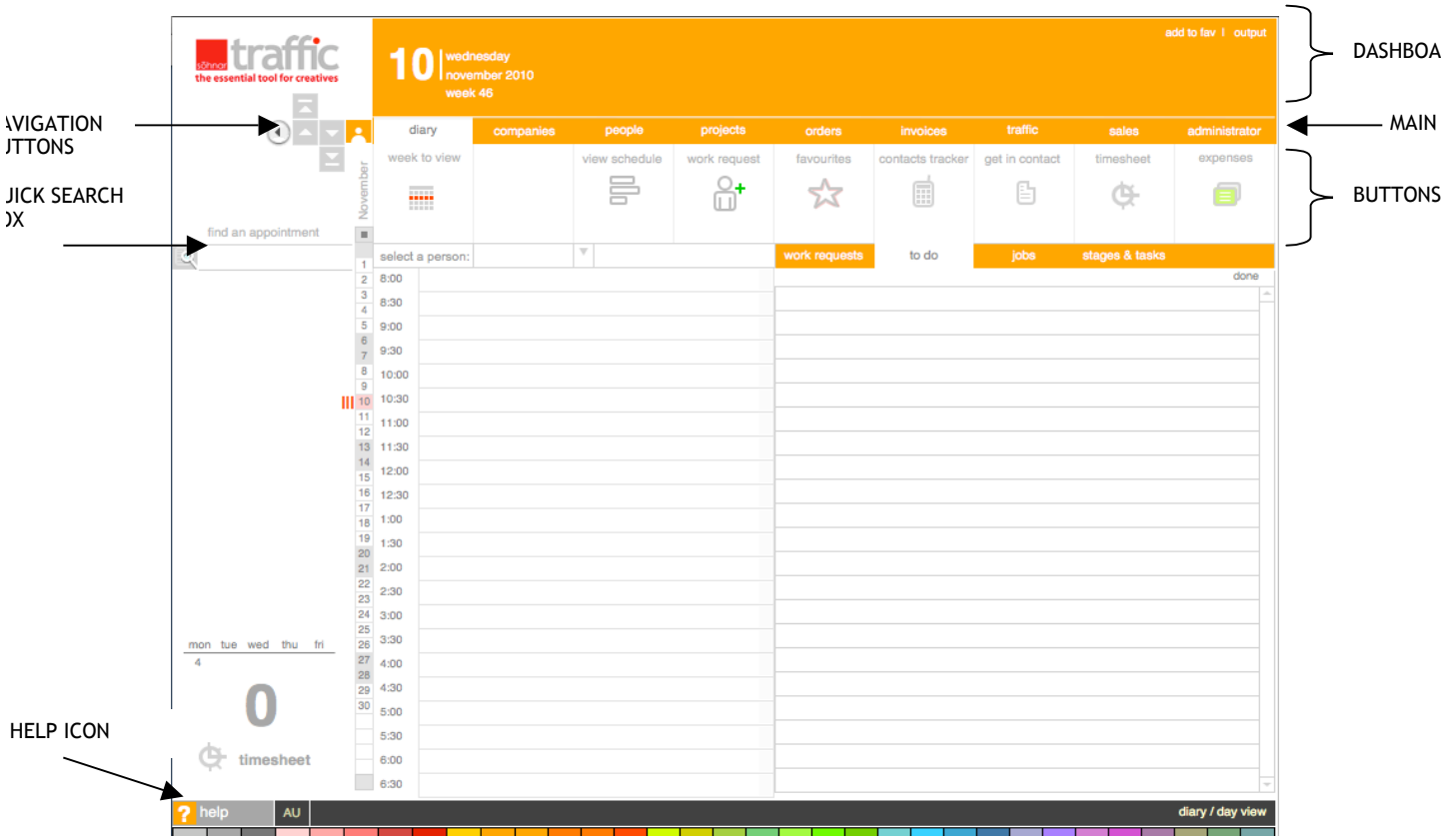


__Note__: If this is the first time you are logging into Traffic the default password is __traffic__. If you ask for your password to be reset, it will always be reset to __traffic__.

Finding your way around

Once you have logged in, Traffic will open up. The first screen you see will be your homepage, or open layout. You can choose which area of Traffic you see on log in, see the section on Administrator for more details about this.

For the purposes of this guide, we will assume that the homepage has been set to the Diary. Below is an illustration of the Traffic Diary page, with some of the main features.



Navigation Buttons

The top part of every Traffic screen contains general information such as the day and date (in diary) and the job number (in job-related screens) are

displayed. On the left are the navigation buttons. These allow you to move through the records as follows:

- go back one record
- go back to first record
- forward one record
- go to last record

***Note**: These navigation buttons are context-sensitive, and will change depending on the type of record selected.*

Log-In Button

Beside the navigation buttons is an orange square icon:
If you need to switch users without reopening the database, click the Login button and the log-in window appears, allowing you to login with a different Account Name.

***Note**: You do not have to log out of one open version of Traffic first to log in again on a different machine, and logging in a second time will not log you off the first one.*

You can see which user is currently logged into Traffic by checking the bottom left-hand corner of any open Traffic window. The initials of the person logged in are always displayed here.

The “help” box in grey will launch the Sohnar Traffic Website (in your default browser) when clicked. Use this to see hints, tips and FAQs about the Traffic system. The “help” box appears on every layout in your Traffic system.

Quick Search Box

Underneath the navigation buttons is a window that allows you to search for records quickly. The search terms that can be used in this box differ depending on which area of Traffic you are in. It will also be labelled differently on each screen.

Adjusting the window size

At the lower left of the screen you will see this size adjustment function.

Traffic automatically opens at the standard size of 100 percent (shown in the window as “100” The two icons to the right are used to increase or decrease the size of the Traffic window by set increments. Click on the two icons to choose a window size that best suits your monitor. On larger size settings you may have to scroll to see the full contents of the window

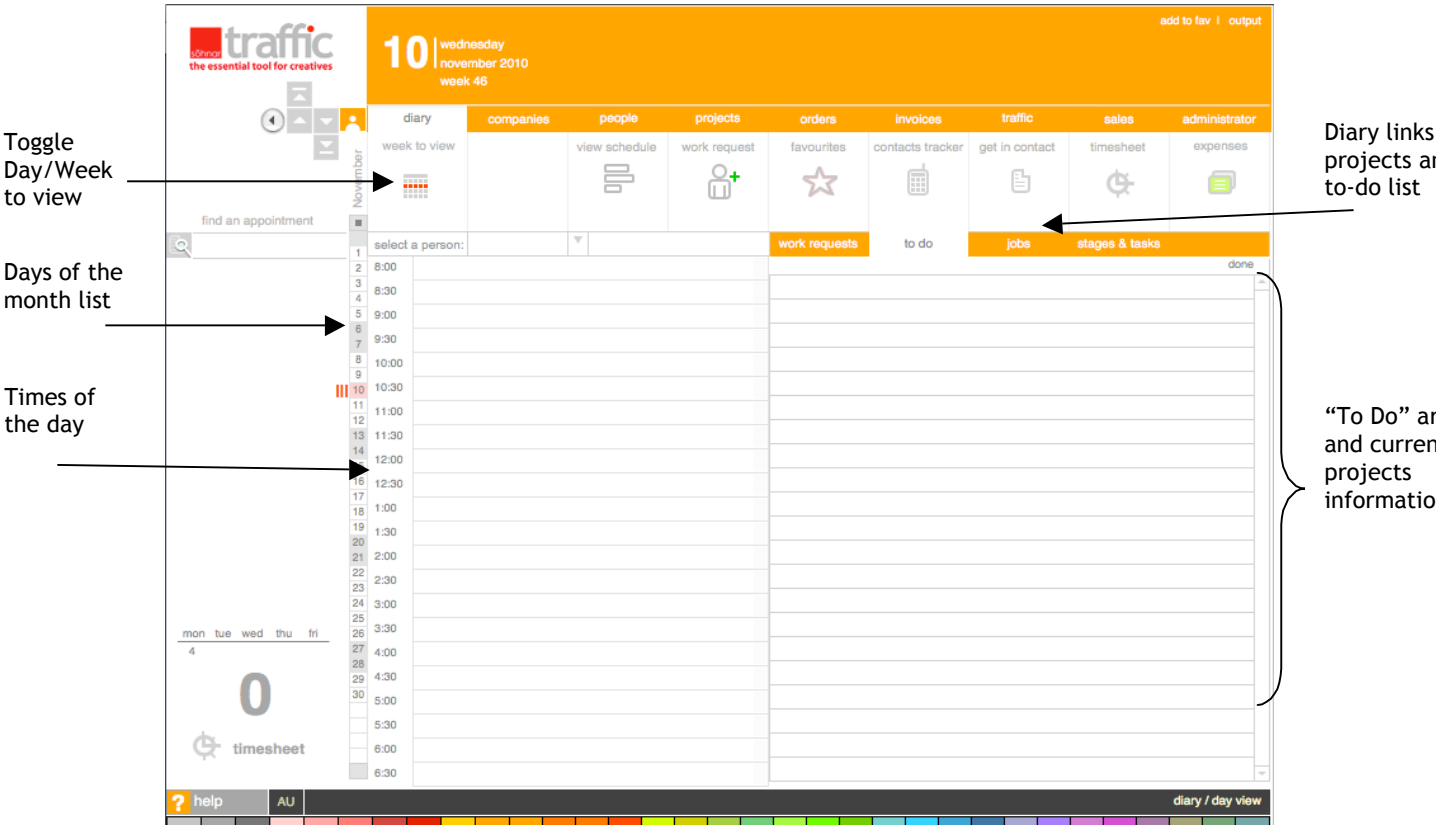
Note: Traffic also resets to 100% size once you close it down.

Back Button

Traffic has a “back” button that works like an internet browser back button – clicking it takes you back one screen to whatever area in Traffic you previously viewed.

THE DIARY

The Diary
The Diary area of Traffic allows you to create appointments, look ahead to see what has been planned, and see various things that are currently timetabled into Traffic.



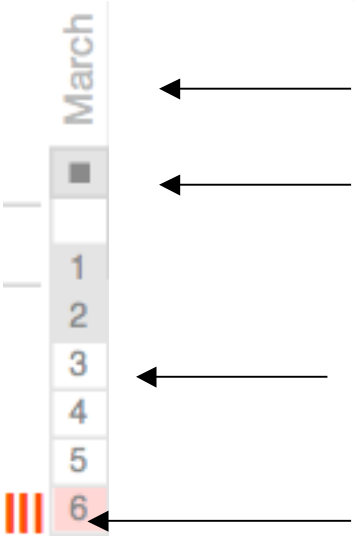
When you open the diary area of Traffic the Day to View will be displayed. This shows you the current working day on the left hand side, where you can make appointments and 5 tabs of displays on the right hand side. These five tabs include "Work Requests". "To Do", "Jobs", "Stages & Tasks", and "Proofs". They will allow you to see what you have planned for the current diary date, and access information coming from other areas of your Traffic system.

Moving around the Diary

When you open the Diary, there are several ways of moving to different dates. The Diary uses the navigation buttons in the following way:

	go to the previous day
	go back to the previous month
	go to the next day
	go to the next month

As well as this, you can click on any date in the column of dates on the left hand side to immediately display that date in the Day to View screen



Current month displayed

Click this button to go to today's date

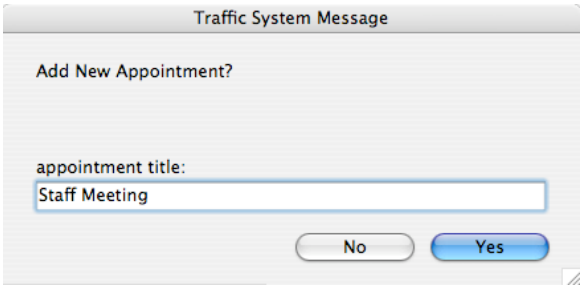
Click any date box to display that date in Day to View mode.

Regardless of what date you are currently viewing, the current date will be marked with three red bars.

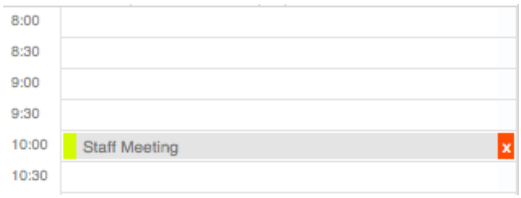
Entering Appointments

Appointments can be entered for any diary date and have various setting options. To enter a new appointment:

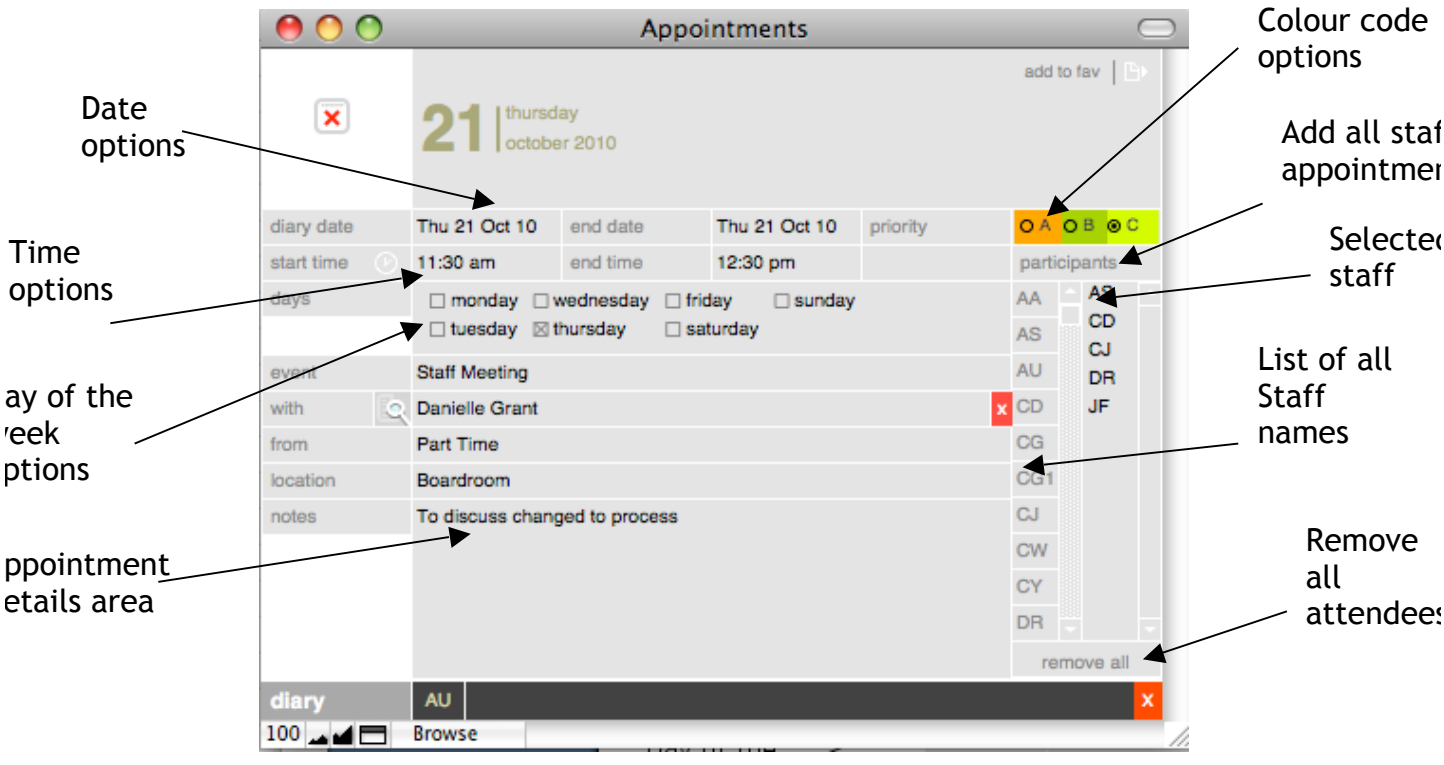
- Select the relevant diary date
- Click on the time you would like the appointment to start. You can choose any half hour time band from 8.00am to 6.30pm
- The following appointment window will appear:



- Type in your chosen appointment name (in our example it is “Staff Meeting”) and click “Yes”.
- The appointment will be listed in your Traffic Diary



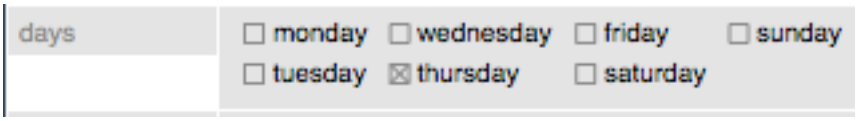
To change or add any further details to this, click on the appointment name in the diary to open up the appointment window.



The appointment can now be amended to suit your needs

Check and amend the start and end date, as well as the start and end time of your appointment.

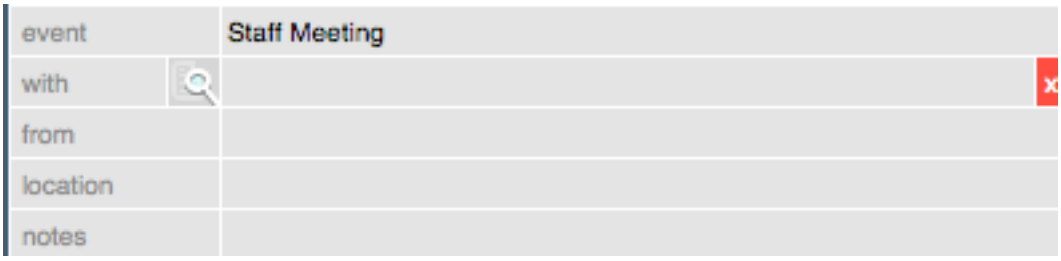
Check and amend the day of the week of the appointment



__Note__: Choosing a date period that lasts for more than one week means that the appointment will be scheduled to appear on every selected day between those dates.

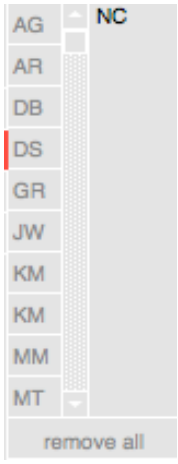
Fill in details of the location and a description of the event in more detail if required.

The “with” icon allows you to attach the name of an external attendee, as long as the person is found within your Traffic People database.



Choose which members of staff you would also like to be included in the appointment.
The creator of the appointment is automatically included.

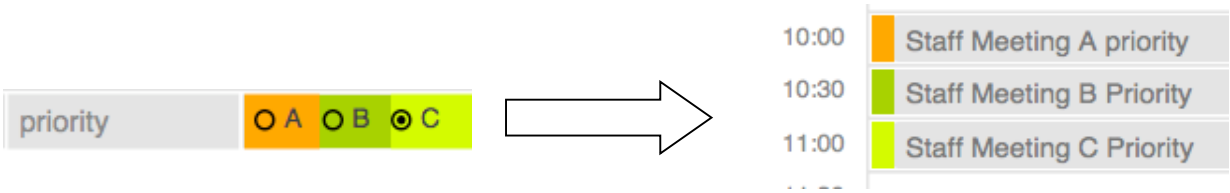
Click the initials of any member of staff in the list to include them. This will add the appointment to their Traffic diaries. Click the initials in this list a second time if you wish to remove a person from the appointment.



Click the “participants” button to add ALL members of staff.

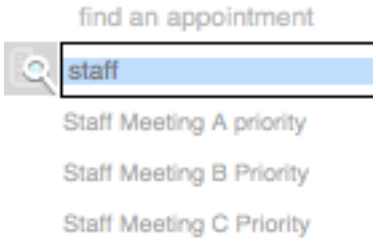
Click the “remove all” button to remove all added names. (The name of the person who created the appointment will be retained)

Click on the A B or C radio buttons to colour code the appointment on your Diary screen.

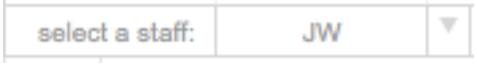


Note: You can choose how to define the use of these colours to suit yourself.

Once the appointment is amended, details of it and any updates to these will appear in the Traffic diary of all staff whose names are included in the appointment. You can see future appointments by simply navigating to the diary date that they appear on.
You can also search for an appointment using the quick find function. In the Diary area, the quick find will bring back search results based on the title of the appointment, no matter what date it falls on.



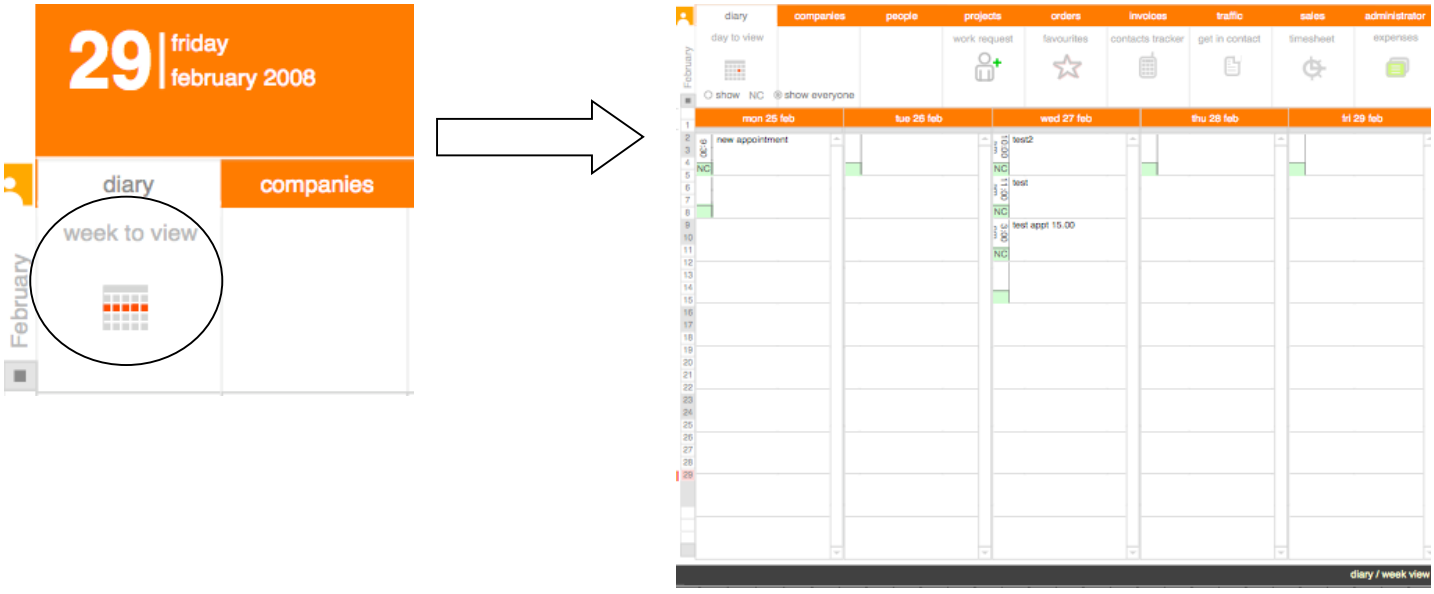
Another way of searching on the Day to View screen is to select a member of staff names from the “select a staff” drop down box. This will display appointments for just the selected person.



Use this function to check availability of other members of staff. You can also make an appointment on someone else’s behalf, if you create the new appointment while their diary view is selected.

Changing to Week To View

Clicking on the “week to view” icon to see the current week of appointments.



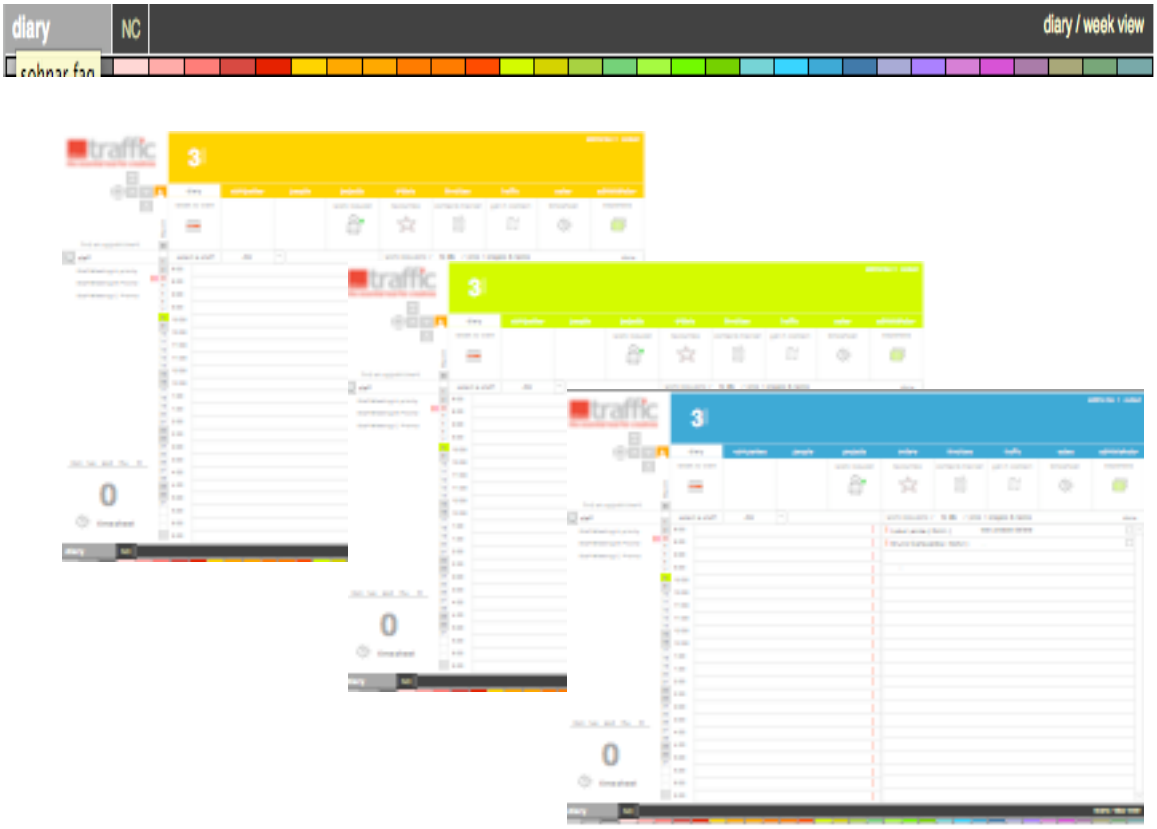
The week to view lets you see all your appointments taking place over the current week. At the top left of the week to view screen is a function that allows you to choose to view another member of staff’s appointments for that week, or click on “show everyone” will display all appointments made for that week.

__Note__: You can move through different week view by using the same navigation methods as used in the Day to View screen. The navigation buttons will move you to the next day or month, and the date number columns will move directly to a chosen day. In all cases, the screen will display the week to view that contains that date.

Note that you cannot view Saturday and Sunday appointments on the Week-to-view screen.

Other Diary Functions

The colour of the diary dashboard can be changed. Each user can choose a colour for their Traffic system. Select your choice of colour from the colour chart at the very bottom of the Traffic window. Traffic will keep the chosen colour setting until you choose to change it again.



The Diary also allows you to view what you have planned for the day ahead. On the right hand side of the Day to View Diary, you will be able to choose from five tabs, each of which shows different useful information

WORK REQUESTS

A list of requests related to ongoing projects that you have received. Here you can see what has been sent to you and respond as required.

TO DO

Reminders to follow up important calls or contacts. Set your own personal reminders and mark them off once actioned.

JOBS

A list of currently scheduled jobs in the studio. See those that you are involved in or just look at a list of all current jobs.

STAGES & TASKS

A list of job stages that you have been scheduled to do. Get a heads-up on what work needs your attention today.

PROOFS

Links you to the external website ProofHQ, which is a web based document proofing application. This requires additional set up, so if this is not active in your Traffic system, contact Sohnar Support if you wish to enable it.

Note: These five areas will be discussed in individual sections later on in this manual.

Synchronizing your Traffic Diary with other calendars

The Traffic Diary can be synchronized with your Outlook Calendar (for PC users) and iCal (for Mac users). If this function is enabled, diary appointments made in Traffic will automatically be created in Outlook or iCal, and appointments made in those calendars will also appear in Traffic. Because this is an additional module to the standard Traffic install, please refer to separate documentation to learn more about how to use this feature.

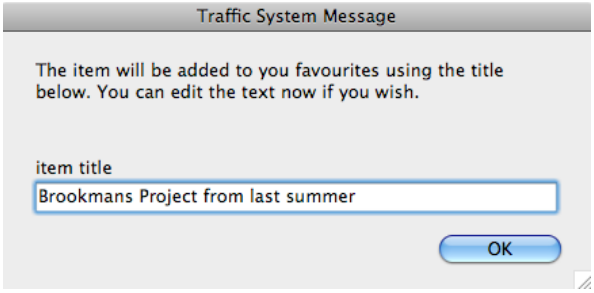
FAVOURITES

Throughout Traffic you will see the “add to fav” button at the top right of any screen that supports this function. This allows you to keep links to your commonly used screens together.

Your favourite tasks might include sending an email to a particular contact or accessing project details for a current project.

To add a favourite

On the Traffic screen you wish to add as a favourite, simply click the link “add to fav” and that screen will be added to your list. You will be able to choose how the entry is named before you save the link.


Traffic System Message
The item will be added to you favourites using the title below. You can edit the text now if you wish.
item title
Brookmans Project from last summer
OK

To access your favourites:

- Click the Favourites icon, which can be found in the Diary area, and your list of favourites will appear.
- Select the link required from the list. Clicking on the line takes you to that screen in Traffic.

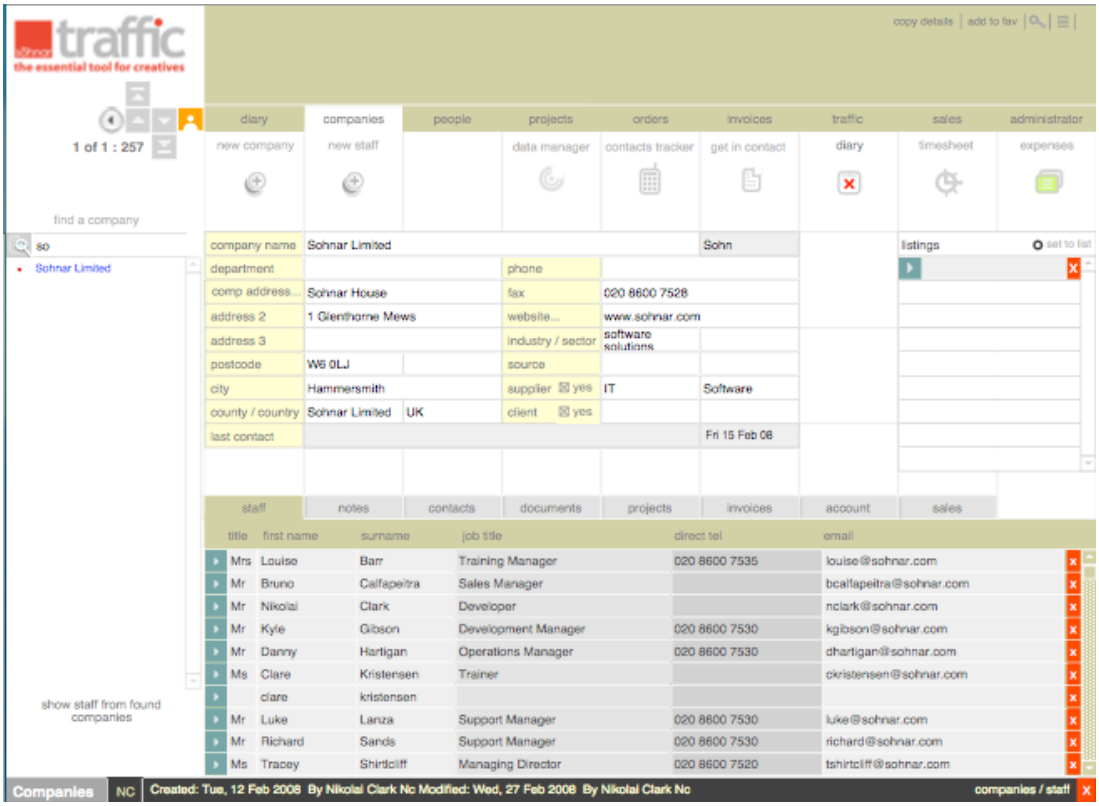
The list of favourites is personal to each user. You can keep the Favourites window open all the time, or just click the icon when you wish to select something from your list.

Items added to your favourites will remain there permanently until you delete them. You can tidy up your favourites list by deleting ones you no longer need with the red “X” square on the appropriate line.

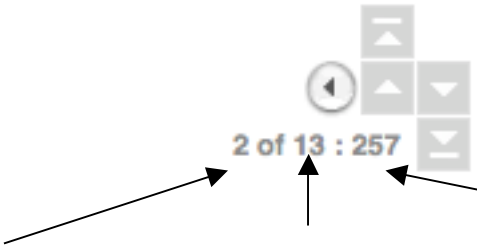
COMPANIES

Traffic stores a complete list of all the companies your organisation deals with. The list is held in one location (on the server), so there is no need to hunt around for information. This list is an essential part of the way Traffic works and it is important that details are entered accurately and maintained.

Click the tab on the main dashboard named “companies” to look at your company records. Here you can also amend the records and add new ones.



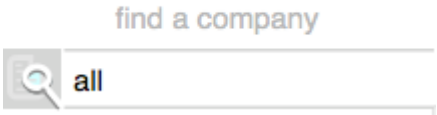
The Companies area of Traffic has the standard navigation buttons and quick find window on the left hand side. You can use the navigation buttons to move through records one at a time, or jump straight to the first or last record on the screen.



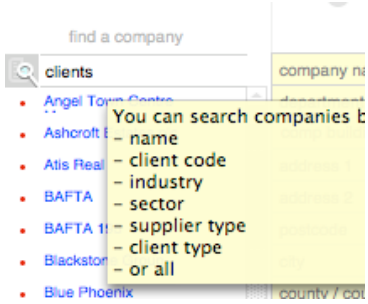
Current record No. of records found (by search) Total no. of records

Note: If you are displaying search results on the screen, the navigation buttons will only move you through the records found in the search.

The Quick Find window



Quick Find in Companies enables you to use many search words and criteria to make a fast search of your records.

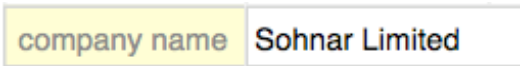


Simply type in the chosen word, and then click on the magnifying glass icon, or press the enter key. Results are displayed in a list in blue, underneath the Find window. Click any item in this list to see the record displayed on the screen.

A roll over menu will tell you what the available search terms are, and these are listed in detail below. Please note this is a “tool tip”, and not a clickable drop down list.

Note: Search terms are not case sensitive.

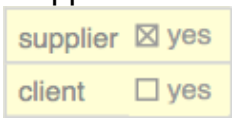
NAME: Search by the first name of a company, or by any letters that begin the company name eg typing “sohn” or “sohnar” would bring up a record with this word at the beginning of the name, and “S” would have the same effect, although it would also include results of all company names beginning with “S”



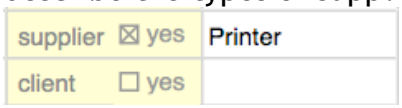
CLIENT CODE: Each company record is given a Client Code when it is created, based on the first four letters of the company name. When you add a new company record (or at any time), you can amend this code to make it something useful or memorable to you.

INDUSTRY and SECTOR: Search for companies based on how you have defined them in the field marked “company/sector”.

SUPPLIERS and CLIENTS: Typing either of these words (use the plural case) into the Find window will display results for all companies defined as either “supplier” or client” (i.e. with supplier or client box checked).



SUPPLIER TYPE and CLIENT TYPE: Search for terms you have used to describe the types of supplier and types of client in your company records.

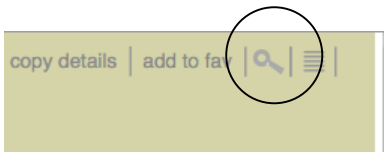


ALL: Type the word “all” into the find window to display all existing company records.

Advanced search

Apart from using the Quick Find, you can also search using any other criteria with the Advanced search option.

Click the magnifying glass icon that appears on the top right corner of the dashboard in Companies. This will display an empty record on the screen.



Type the search term you wish to find records for into any window. For example, you may wish to do a search for all companies in the same city, or for a single word in the company name that is not the first word of that company’s name, for example the word “Limited”.

You may enter search terms into more than one field if you wish, and Traffic will look just for records that contain the terms in all the fields you have

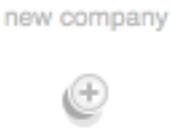
used, for example enter a name in the “city” field and checking the “supplier” button will bring up results for all suppliers in that city.

Click outside of any active field and then hit your ‘enter’ key to display search results.

Note: If there are no results for the terms you used, you will see a message to that effect. If you wish to abandon the search, you can press the “enter” key and just press cancel.

Adding a new company record

To add a new company to the database:



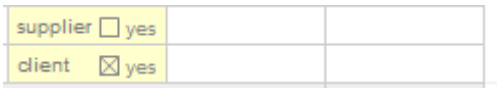
Click on the “new company” plus button at the top of the screen. A dialogue box will ask you to confirm that you wish to proceed. Click Yes.

You will now be looking at a blank company screen. Working your way through the fields, you should enter: company name, department, building, street, postcode, city, county/country.

Note: The Client Code window will automatically be filled in at this time, so change this now if you prefer to choose your own code. Note also that you can store two addresses for each company. By clicking on the box marked “comp address” you can add a second address for reference only. The company address will be used by Traffic for documents and communication.

If you fill in the company website, you can click on the box marked “website…” to automatically open that URL in your web browser. Industry/sector and source should be used to store relevant information that you think may be useful as a search term or way of defining a company. These fields have a second empty space to the right of them if you wish to further define a category type.

Below the source field are the client and supplier checkboxes. Click so that a cross appears in the box if you wish to make the company a supplier or client. A company can be both a client and supplier, and all companies should be marked as at least one.



Click on the blank field to right of checkbox to bring up a drop-down list of supplier or client types to choose from. Select the one you want.

Note: These drop down lists (Industry/Sector/Source/Supplier Type/Client Type) are pre-defined and managed in the Administrator tab of Traffic. If you wish to add new entry, ask a person who has Administrator permissions in your Traffic system to add new options to the list.

Further information

The tabs on the lower half of the screen contain more fields in which you can enter other company details.

Staff: Enter the names, job titles and contact details for staff who work at the company. You can click the "new staff" plus button at the top of the screen, or just start writing in the first available line under the staff tab.

Note: Make sure to add at least one member of staff for all active companies, as Traffic relies on having a contact name to use these records elsewhere in the system.

Notes: Use the large field to add text notes about the company. On the right hand side are 8 fields that you can name yourself, if you want a set of fields for storing information that are not covered by the default company record settings. The top one of these fields is set already as "parent" – If you have several records for related companies (for example branches of a large company in different cities), you can check the "yes" box here and enter the global name for that company in the space provided. The name used here will appear on outgoing documents and emails, rather than the company record name, which you may have written differently to help identify each branch or location.

Note: The field name titles in this particular area must be set at server level - ask Sohnar support for help in doing this.

Contacts: Shows stored correspondence for any person working at the company. See separate section later in this manual for more information.

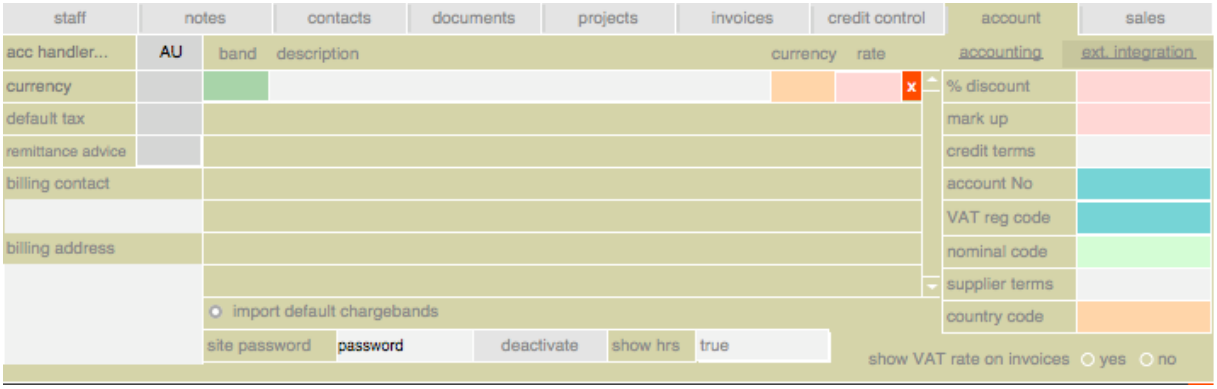
Documents: Stores links to PDFs of estimates, tender and order documents raised for this company. See separate section later in this manual for more information.

Projects: Links to any project created for this company, whether current or closed.

Invoices: Links to any invoices created for this company.

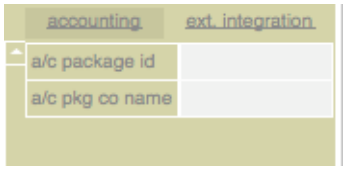
Credit Control: Shows links to any issued invoices for this company that are overdue. See separate section under “invoicing” for more details on this.

Account: Several default settings for the company can be set here, some will over-ride the general system defaults for all company records:

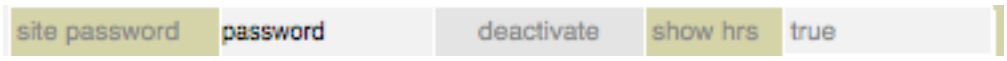


- Acc handler - set the initials of a member of your own staff, if projects raised for this company are always to be handled by the same person.
- Currency – set a currency if projects raised for this company are always done in a currency other than your system default.
- Default Tax – Pre-set a tax code that should be the default on invoices raised for this client
- Remittance Advice – Choose a bank account to be used for payment details on all invoices for this client (you may only have one bank account stored in Traffic, in which case you can ignore this)
- Billing contact/address – set a billing address if you would like to have a different name and address on invoices, rather then the main company address.
- Band – set charge bands that are only to be used for this company. See the section on charge bands later in this manual for more information.

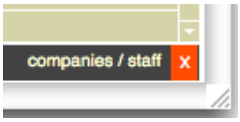
- % discount – record a discount you may give this company for all projects created.
- Mark up – Set a figure here as a fraction if you wish it to apply to all costs invoiced to this company. Traffic also lets you set a global mark up figure, which appears on all costs, so any figure filled in here will over-ride that.
- Credit terms & supplier terms - Set a value here to appear on all invoices relating to this company. The value should be a figure representing number of days required for payment of invoices, eg 14, 30, etc. This will over-ride the main system settings.
- On the far right you will see "accounting" information including Account number, vat reg code, nominal code– set for this company if required (relates to use of Traffic in conjunction with accounts software packages – ask Sohnar support for details about this).
- Beside "accounting" there is a field marked "ext integration". Click here to show Account package names and details . If you have an link between your Traffic system and an accounts application, you ill be instructed on how to fill this in.



- Site Password - This function relates to the Client Module. Please refer to separate section in this manual for more details on this.



Deleting a company record

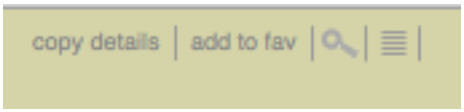


The red "X" box at the bottom right hand corner of the screen allows you to delete the company record being displayed.

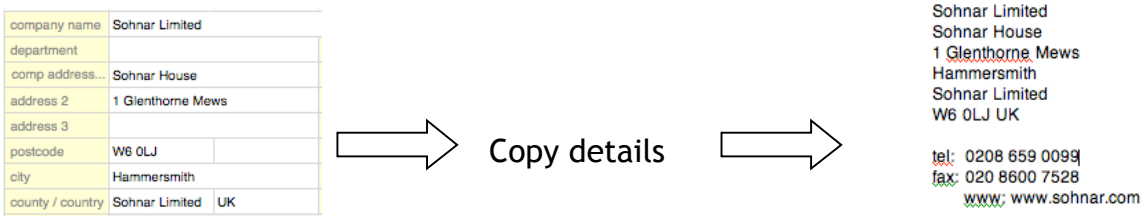
Note: Do not delete company records if you have already used the company's details in any other part of the Traffic system. In most cases, mark somewhere in the record that the company is no longer active to preserve links to data within Traffic. Also be aware that any staff records relating to this company will remain in the system (in the People area) but with no associated company.

Other functions

At the top right of the ‘companies’ area are some additional functions to make using your company records more convenient.



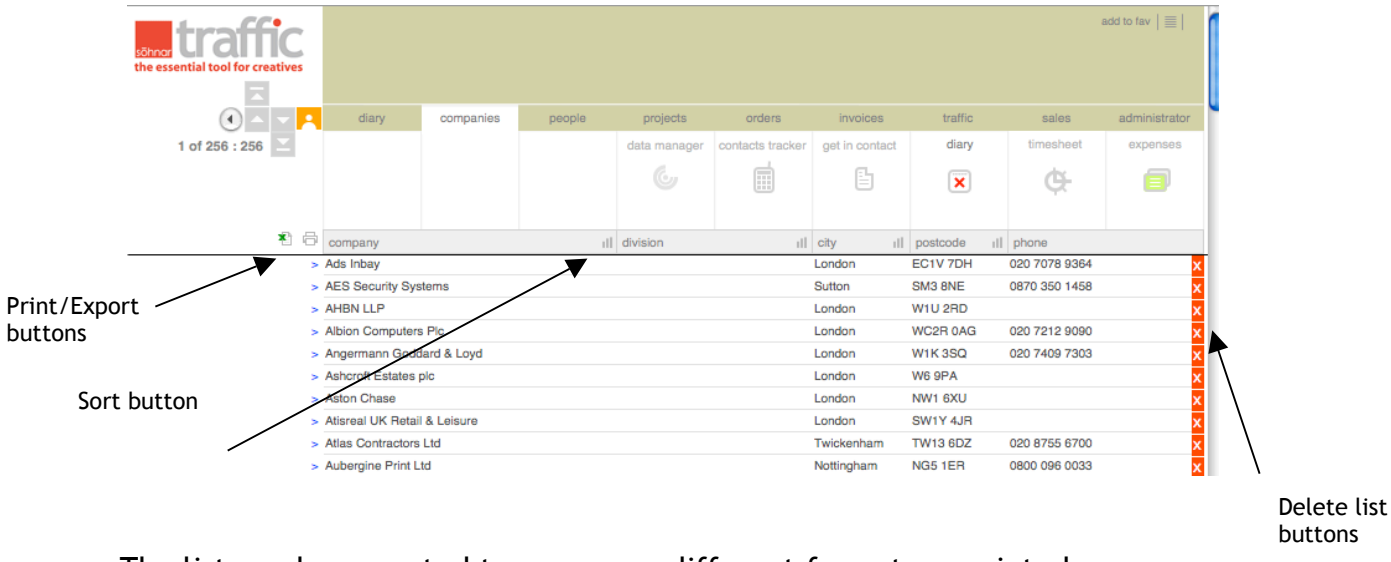
Copy Details: With any company record on screen, click “copy details” to copy the company name and address and store it on the clipboard. This can then be pasted into any suitable application like Word, an email, etc.



Show as a list: With any search results displayed on the screen, click the “show as a list” icon.

Traffic will then display the results in list format which you can use to print or export to another application.

Records displayed as a list:

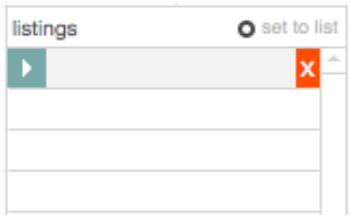


The list can be exported to numerous different formats or printed as a report.

The Sort icon will sort the records into alphabetical order depending on the column you choose to sort by.

The red “X” delete buttons in this list view will only delete records from the view, so that you can remove lines before printing or exporting. Company records will not be lost.

Creating lists



You can also use the “set to list” function to save records to lists instead of searching for them every time. The lists can be named by you and stored within Traffic. And then viewed, exported or printed at any time.

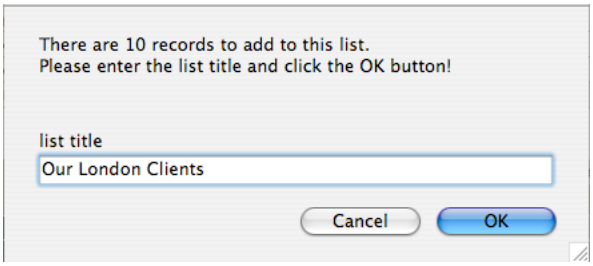
To create a list:

Carry out the search required to bring the records on screen that you wish to save as a list. Be sure that the records you want to make into a list are selected – you can tell what records are currently selected by checking the numbers in the top left corner.

Note: If you have performed a quick search, be sure to click on one of the results listed in blue to see the records displayed on screen.

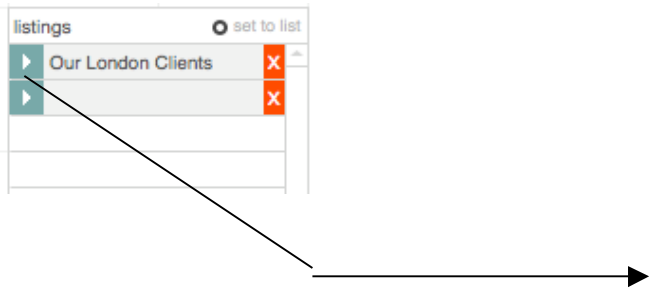
Once you are happy, click on the button marked “set to list” on the right of the screen, in the box labelled “listings”.

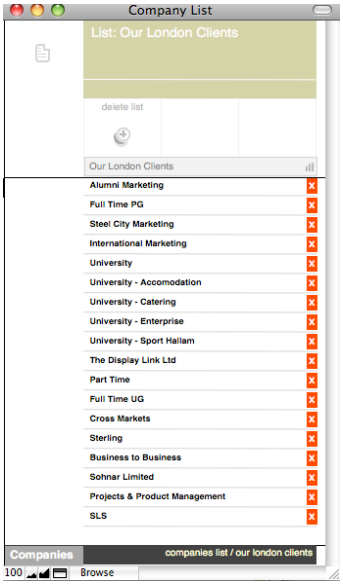
A dialogue box will appear confirming the number of records found, and you will be asked to choose a name for the list these records will be set to.


There are 10 records to add to this list.
Please enter the list title and click the OK button!
list title
Our London Clients
Cancel
OK

Note: You can add more companies to the same list by typing the name of an existing list into the pop up window at stage 3, above.

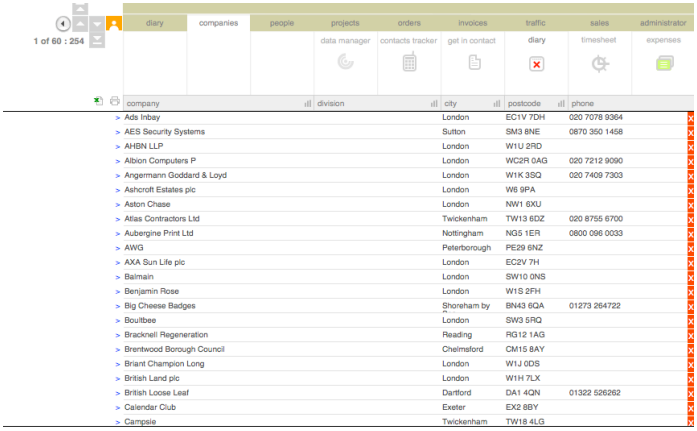
This list will now be saved. The companies that are on that list will display it in the list box, and the whole list can be viewed as a summary by clicking on the green square button in his box.



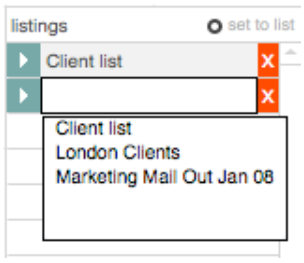


There is a “delete list” button available when opened in this view. You can also remove names from the list permanently by using the red delete button.

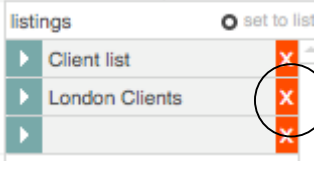
Alternately, click on the NAME of the list to view all the record in full screen list mode:



You can add any company to a previously created list by using the first available empty list space on that company record, and selecting the list you wish to add them to from the drop down of previously made lists.



To remove a company from a list, simple click the red “X” button to the right of the list name on their company record.



traffic
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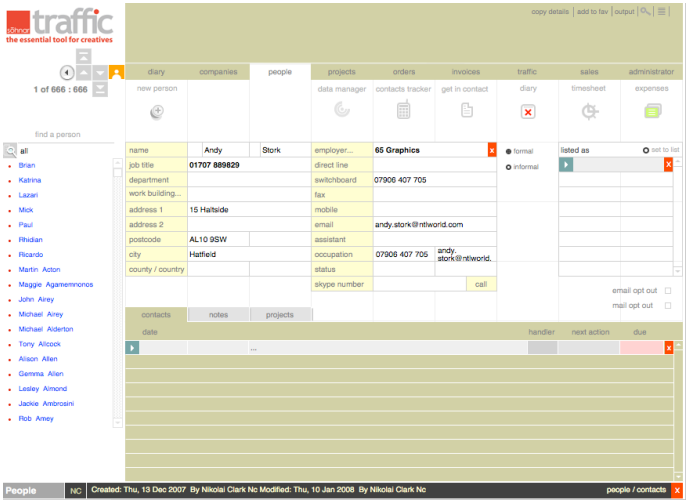
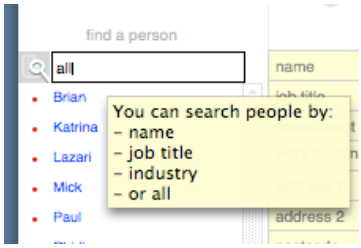
PEOPLE

The people area of Traffic contains details of all the people you have contact with, both clients and suppliers. To access the People area, simply click on the People tab at the top of the screen. The People area of Traffic will appear:

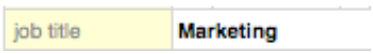


The People area also has a quick find function, similar to that in Companies, to help you find records quickly. As in Companies, once you click the magnifying glass to carry out the search, click on one of the search results (which appear in blue) to see the found records displayed.
The search terms this supports are as follows:



NAME: Enter the first name OR surname of the person. If you type a single letter, Traffic will display all first names that begin with that letter, but surnames will only be displayed if typed in full.

JOB TITLE: Type in the Job Title to search for all people who have that job.



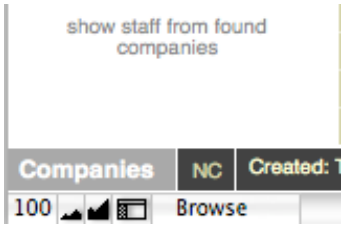
INDUSTRY: This field supports the data that is entered in the Company area for that person.

ALL: Brings back all records.

You can also do an Advanced Search in the People area with the magnifying glass icon at the top right of the screen, which works the same way as the one in Companies.

The fields containing company name and address details are not available searches in the People area. If you wish to search for people based on the company or address they work for, there is a special search for this in the Companies area:

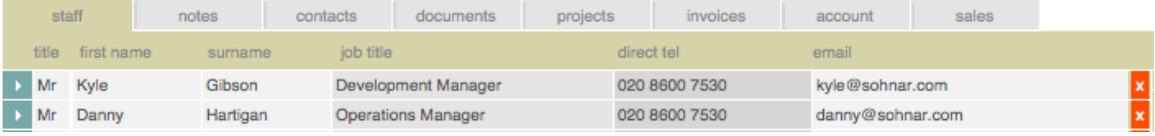
People searching by Company



The Companies area of Traffic has a special function called "show staff from found companies" (bottom left-hand corner of the screen). This allows you to search for specific Companies or companies by area, supplier and client type, etc, and then see all staff records for the results. This can be very useful in creating lists of people, which is described again at the end of the "people" section in this manual.
For example:
Do a search in companies for all clients.
Once the results are displayed on the screen, click on "show staff from found companies".
Traffic will display all staff record for you in the People area.
You will now be looking at people records for everyone who works for any company that is a client.

Adding a new person

There are two ways to do this. The fastest way is to add a person as a member of staff of one of your company records. By doing this you automatically create the people record immediately, complete with company details.



The other way is to use the New Person plus button at the top of the screen.
To add a new person:
Ensure the person's company has been created previously in the Company area.

From the People screen, click the new person plus button.

This creates a blank people record for you to complete.

To link this person to a company, click the “Select employer… “ yellow box and choose from one of your existing companies, to add the company the person works for to their record.

Note: You should not enter people records without associating them with a company record. If you need to enter a Freelancer or self employed person, create a company record first under their name, and make them a member of staff for that company.

Once you have the person’s record and the company they work for is correctly assigned, you can fill out any remaining fields with as much detail as you need.

Formal/Informal
Use this field for your reference about how this person prefers to be addressed.

Email/mail opt out
Use this field for your reference if this person wishes to opt out of mailings.

The People records also have tabs at the bottom of the screen for storing further information.

CONTACTS: A list of contact records for this person. See separate section on this later in this manual.

NOTES: A blank space to hold any text that you would like to add about that person.

The notes area also contains a further 9 fields where you can store personal information about the person if required. The field names here are not editable.

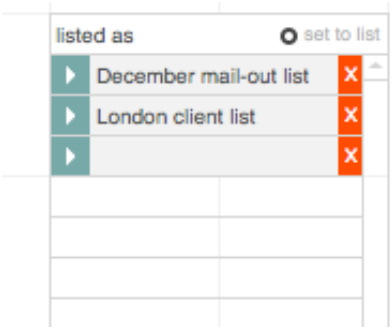
PROJECTS: A list of any projects created for which that person has been made the main contact.

Making Lists of People

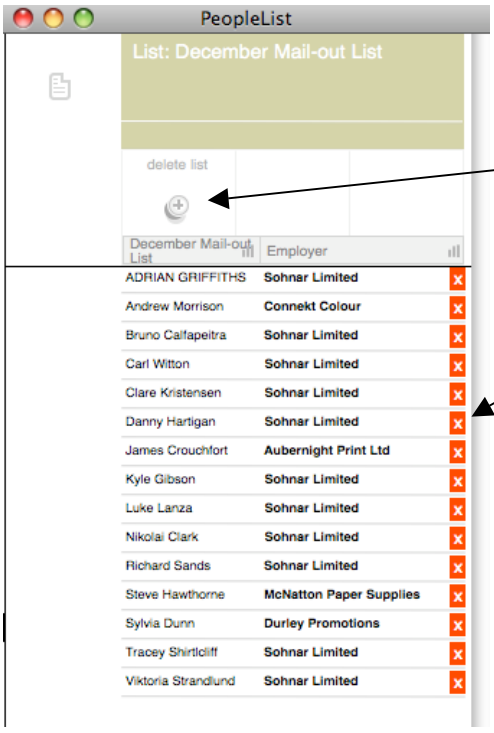
The steps to create lists of people are the same as those for creating lists of companies. With lists of people, however, you can go on to create letters for mail outs, send group emails, and print address labels. These functions are called Outputs.

Before doing this, you may want to review the names on your people list. To view and amend a list in the people area, find a record that is featured on the list. The lists that a person is a member of will appear on the far right hand side of the people record.

Here you can review which lists any record is on, as well as using the first empty field underneath any existing list names to add the record to any other existing lists.



To view the list, click on the green “go into” button beside the list name you wish to view. In view format, a list from the People area looks like this:

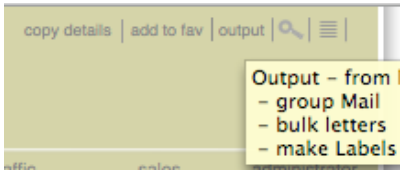


Delete whole list with this button

Delete unwanted names from list with the red “ X” buttons

Note: If you are making lists of staff from groups of companies, use this screen to remove names of staff that you do not need, for example, you only need one staff member per company to receive mail-outs, etc.

Outputs from Lists



To access the outputs area, click on the "outputs" link at the top right-hand corner of the People area dashboard. From here you will be able to choose which of the options you wish to use the list for.

The Outputs screen gives you a step by step guide on what to do.

Output to labels:

- From the People area, click the Output option (top right of screen).
- Choose the list you need from Select List area.
- Select "import list" option.
- Any names not required for this output can be deleted with the red "X" on that line (This does not remove them from the list, just from the output function you are doing).
- Choose the label format required (e.g. 18up Avery 7161 A4).
- Check "label formality" set up and select the format required e.g. Mr Steve Smith.
- Select "Create labels" on the far left.
- Choose "Preview" or simply print your labels.

Output to letter:

- From the People area, click the Output option (top right of screen).
- Choose the list you need from Select List area.
- Select "import list" option.
- Any names not required for this output can be deleted with the red "X" on that line (This does not remove them from the list, just from the output function you are doing).
- Choose the "mail to list" option on the far left.
- Write your letter in the space provided. For formatted letters that automatically fill in details such as name and address for everyone you are creating the letter for, click on one of the templates listed on the right hand side. These templates have one or more pre-formatted fields to bring in things like name of recipient, address of recipient, your address and job title, etc, depending on the template used.
- After choosing a template, remember to write in your own text in the main body of the letter.
- Click "print/view" in the lower right hand corner to see the letter layout style, after which you can print out your copies.

Note: Sohnar provides a set of default letter and email templates, but you can create more templates yourself. Please ask Sohnar Support for more information about this.

Output to email:

- From the People area, click the Output option (top right of screen).
- Choose the list you need from Select List area.
- Select "import list" option.
- Any names not required for this output can be deleted with the red "X" on that line (This does not remove them from the list, just from the output function you are doing)
- Choose the "email to list" option on the far left
- Write your email in the space provided. For formatted emails that automatically fill in details such as name and address for everyone you are creating the letter for, click on one of the templates listed on the right hand side. These templates have one or more pre-formatted fields to bring in things like name of recipient, address of recipient, your address and job title, etc, depending on the template used.
- After choosing a template, remember to write in your own text in the main body of the letter, and fill in the subject line.
- You can also amend the priority of a group email, and add attachments.
- Click "send email" in the lower right hand corner to immediately send the emails out. You will not be given any more prompts, so be sure your email is ready to send before you click this button.

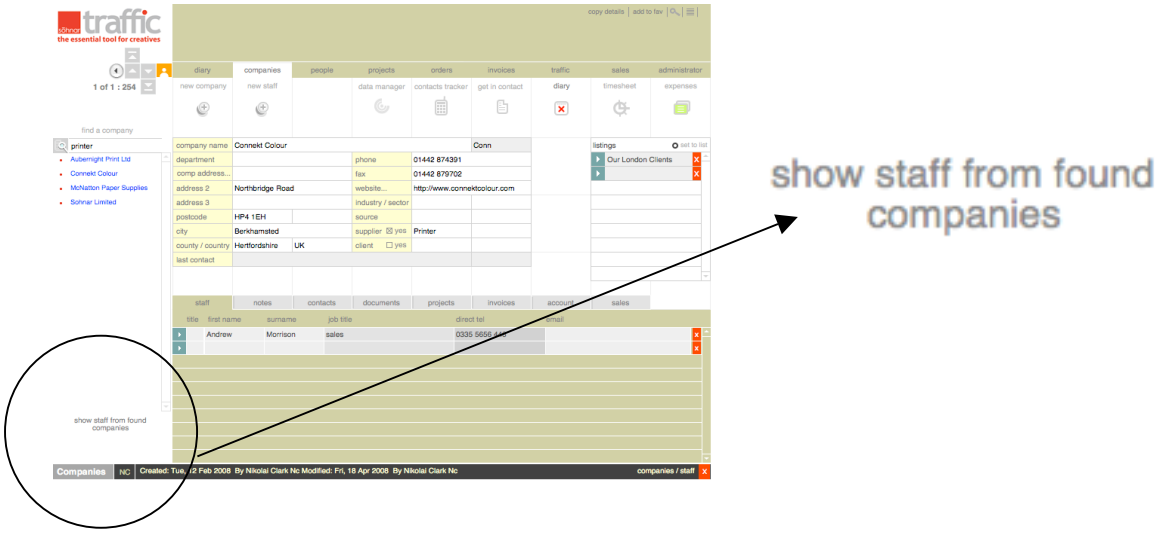
Note: Both letters and emails to lists have a "next action" and "action date" field at the bottom of the screen. This will be covered in the section on "Get In Contact", later in this manual

Making lists of staff at groups of companies

There is a difference between making a list of companies, and making a list of the people who work for them. A list of companies cannot be used for bulk mail-outs, whereas a list of people can. Traffic has a function specifically made for you to add all the people from a company search to a list. For example, contact names of staff that work for all your print suppliers, or all staff that work for companies marked as clients. The way to do it is as follows:

On the Companies tab, search for the companies to create your list from by using either the fast search or advanced search, for example, search for all your Print suppliers.

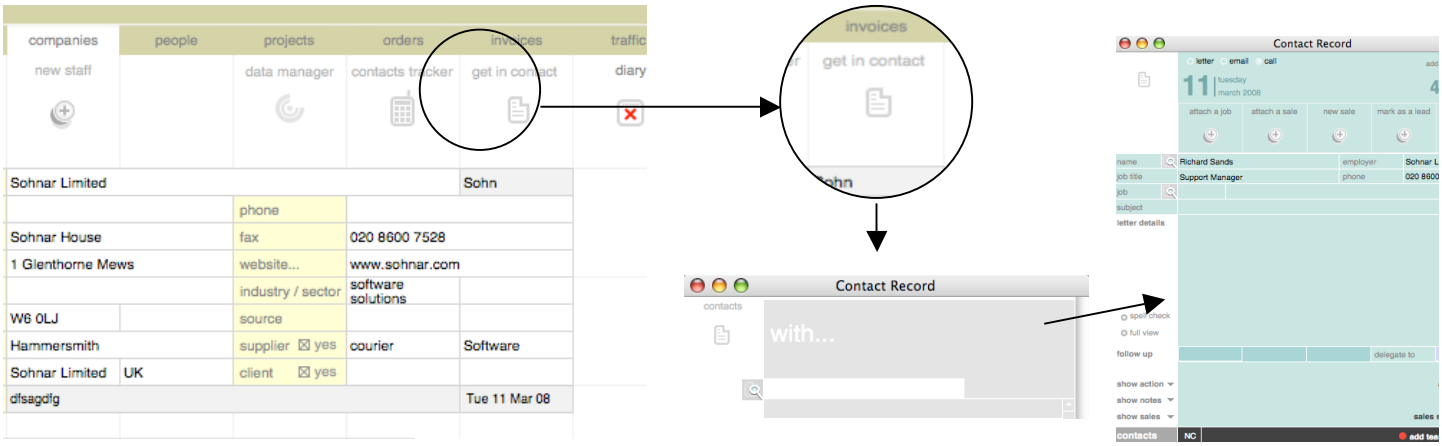
Once the records of print suppliers are on the screen, look in the lower left hand corner of the screen for a link named **“show staff from found companies”.**



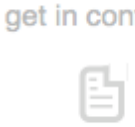
Once you click on this link, Traffic will take you to the People section and display onscreen the records of all staff who work for all the companies that were found by your previous company search. You can now set these people to a people list as described above, giving you a list that you can use to contact all the people that work for certain businesses.

GET IN CONTACT

Get In Contact allows you to create a record of the contacts you make with people listed in Traffic. A contact record could be a log of a telephone conversation, or a record of an incoming letter or email. It can also be used to produce outgoing letters and emails.



To open a contact record, click on the "get in contact" icon, this appears at the top of the screen of many Traffic views.



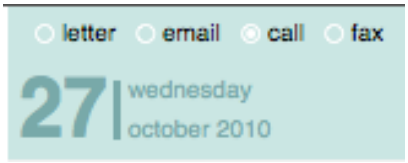
Depending on where you are in Traffic, you will be asked to choose who the contact record relates to:

- If you are in the Diary, Projects Orders, Invoice or Traffic area, you will see a search window, and will need to find the name of the person you require.
- If you are in a Company record, you will get a search window that only lists names of people who work for that company.
- If you are in a People record, you will simply be asked to confirm that the contact record is for that person.

Once you have opened a Get in Contact window, the record can be marked as one of four available options - Call, Mail, Email or Fax. These will be discussed in separate sections below.

Get in Contact - Call

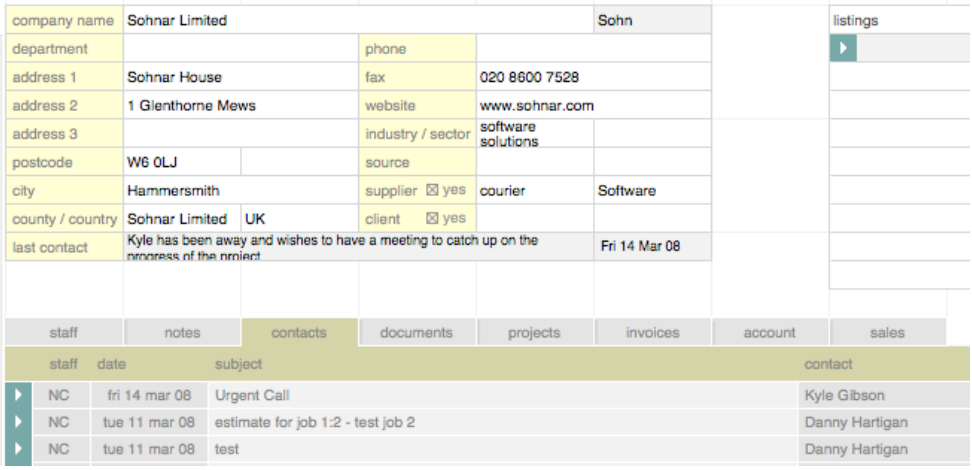
Open a Get in Contact window and click the top left hand corner radio button marked “call” to set the record as a “call”.



Now you can enter the details of the call into the record, by giving it a subject and typing more details into the main body text window.

Once you have recorded the details you can simply close the record, and Traffic will automatically store it against the people record for that person, and for the company they work for(under the tabs called “contacts” in bth cases).

The company record also lists the first line of the latest contact in the main view. The date and time that the record was created are saved, along with the name of the person who created the record.



There are further options available that can make contact records even more useful. Most of these behave in the same way for all the settings (of call/email/letter or fax).

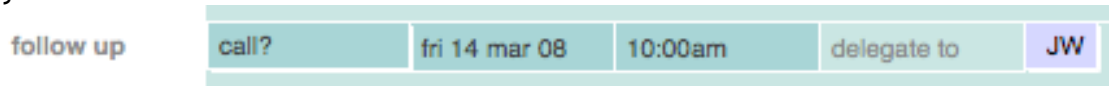
Follow up actions

You can set yourself a follow up action for every contact record made, which creates a link to the record in your diary area, as well as generating a pop up alert that reminds you of the action you set yourself.

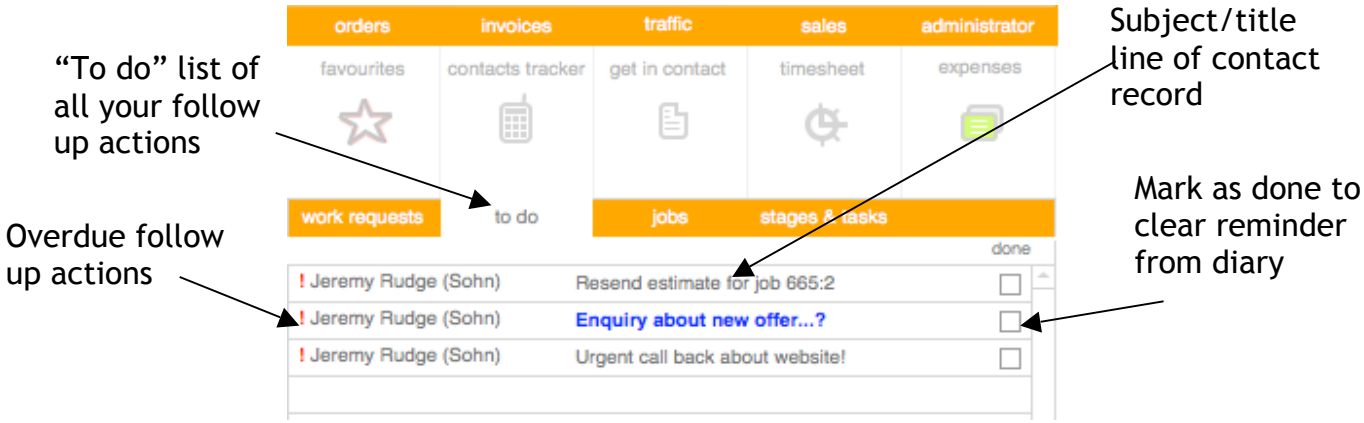
To set a follow up action you need to fill in the details of the action in the fields at the bottom of the contact window.

Choose from the following options:

- Action – Select the type of action from call, meeting, email, etc, to set the reminder for. The choice is: call, email, meeting, task, close, no action and terminate. The choice you make has no further effect on the record, so choose one appropriate to your definition. Note also that the last three (close, no action, terminate) do not add an entry to your diar y “to-do” list.
- Date – The date the follow up action is to be done on.
- Time – Choose the time of day. (These setting will also define when you receive the pop-up reminder). If you don’t wish to have an alert, leave the time field blank, and just add the date to get the “to do” list entry.
- Delegate to – Who is to receive the action and the reminder? This might be another member of staff. Leaving this field empty defaults the recipient to
  yourself.



Each contact record that has a follow up action can now be viewed in your Traffic Diary, on the right hand side under the “to do” tab.



Each line entry provides a link directly to the contact record, which will open in a separate window. You do not need to wait for the pop-up reminder to open the contact window, but it will appear to prompt you at approximately 10-15 minutes before the follow-up action is due.
Once you have carried out the follow up action, you can clear the reminder buy clicking the “done” button against the line. If you do not clear the reminders, they will stay in your diary. Overdue actions are marked with a red “!” mark.

Note: Deleting follow up actions does not delete the contact record itself.

Using the Plus Buttons

Each contact record has plus buttons at the top of the window that enables you to customise it still further.

Attach a job: Use this button to connect the contact record to a particular job. This function is extremely useful for keeping all correspondence about an ongoing job stored in Traffic for future reference.

Note: If you make a mistake, click the button marked “remove job” to delete the link to a job.

Attach a Sale/New Sale/Mark as a Lead: Used to link the contact record to a possible new business opportunity. Details on this can be found in a separate section on Sales and New Business elsewhere in this manual.

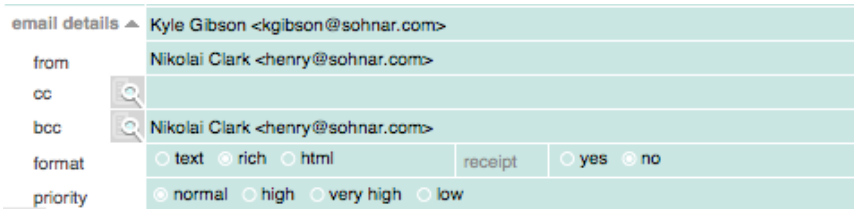
Select template: Use a template to make the body text of the record much more formal. This is more important if the record is intended for printing or emailing. See below.

Now let's look at other uses of contact records other than calls.

Get In Contact – Email record

If you click the radio button at the top of the record marked "email", the record window changes slightly to offer you different options that relate to email. An email contact record might be a simple record of an email, or it might be used to create an email that can be sent out from Traffic.

Differences in an "email" get in contact record are seen just below the subject line. Options that you would normally associate with sending an email are now available. (These options may be displayed or hidden by using the small triangle arrow button).



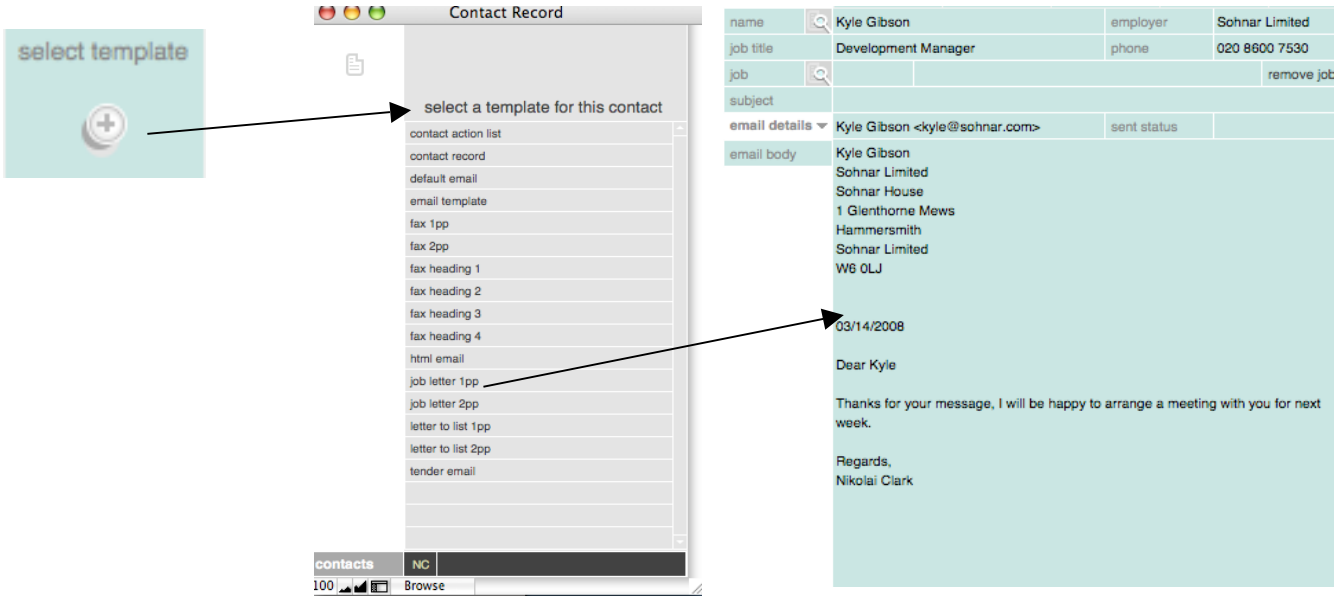
Normal Traffic settings will set up BCC for you, if you choose to send the email. You can also search the Traffic database for more names to add as CC recipients (click the magnifying glass icon to bring up a search window), and use other setting such as priority and receipt request can also be used.

Attachments – At the bottom of the record window is the "attachments" box. Click here to browse for and add an attachment.

Using Templates

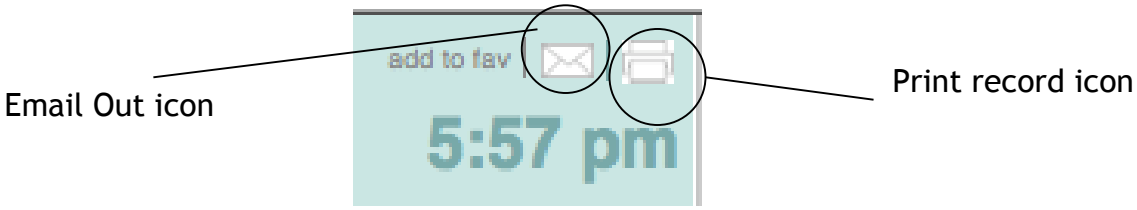
If you wish to send a more formally written email, you may wish to use a template. The templates can be accessed by clicking the "select template" plus button. A list of available templates will be displayed and you choose the most suitable. Many of them will contain pre-formatted fields that automatically populate with text such as the sender and recipient's name and company details.

Sohnar will set up a standard set when Traffic is installed but you can also create your own – this is described in the section on Administrator later in this manual.



Sending emails

If you wish to send this contact record as an email out of Traffic, click on the email out icon that appears at the top right hand corner of the contact window.



Emails sent out of Traffic will look no different to emails sent from your normal email system. They can also include an auto-signature, which you can set up in the Administrator area of Traffic. Whether you choose to email the record or not, it will still be automatically saved in Traffic once you close it. You can also use the "follow up actions" settings in the same way as described above, and choose to attach a job or mark as a sale or lead, using the other plus buttons.

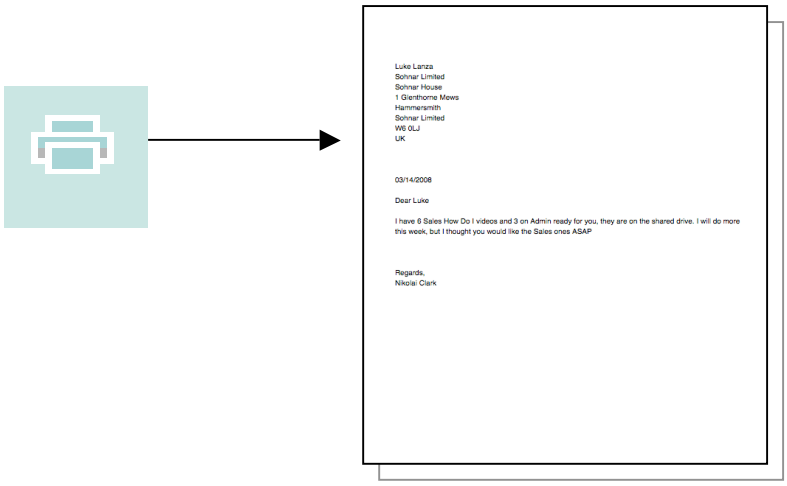
Get in Contact – Letter record

The third way of using Contacts is to create a record that can also be printed as a formal letter. To do this, simply click the "letter" button at the top of the contact window.

The record changes slightly to give you options for printing the record as a letter. In essence it is the same as a "call" record but the use of templates is more applicable here.

Note: If you use a template on a letter or email contact record, there is an option called "full view" that allows you to see the record expanded in size to judge the look of the template more easily.

To print the letter, use the print icon. You will be able to preview the whole document before committing to print. You will also be able to choose to print the letter with or without a letterhead background.

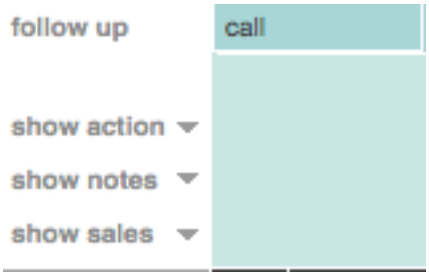

Luke Lanza
Sohnar Limited
Sohnar House
1 Glenthorne Mews
Hammersmith
Sohnar Limited
W6 0LJ
UK
03/14/2008
Dear Luke
I have 6 Sales How Do I videos and 3 on Admin ready for you, they are on the shared drive. I will do more this week, but I thought you would like the Sales ones ASAP
Regards,
Nikolai Clark

Again, the record will be automatically stored, and you can set follow up actions if required.

Get in Contact – Fax

The fourth way of using Contacts is to print out the contents and fax them. This select button marls that this record was sent as a fax, and so its use is exactly the same as a letter record. (Traffic does not link to a fax machine).

Actions and Notes

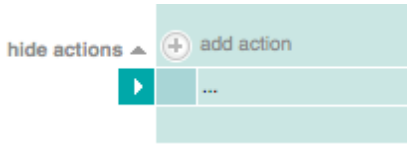


At the bottom of the contact window, regardless of the type of contact, are optional settings to add further Actions and Notes. These can be used to store more communications or follow up action reminders if you need a second reminder to return to this record later on after carrying out your first follow up. This section is optional, as you may wish to open new contact records for each instance of communication.

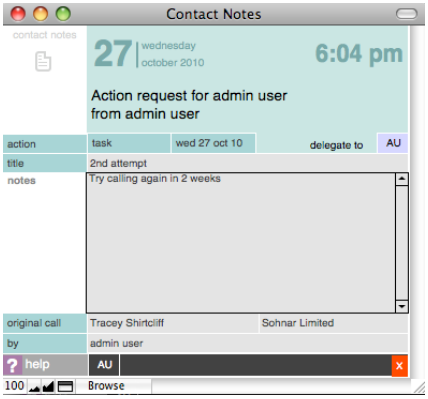
You can add multiple extra notes and follow up calls to an original contact record

Example: To add further actions

1. Click “show actions”
2. A button will appear named “add action”



3. A small window will pop up, allowing you to add a further action and set an alert.



To add further notes, click the “show notes” link and press the button icon called “add note”. Continue entering notes into the window that appears for you.

The “show sales” option will be covered in the sales area of this manual.

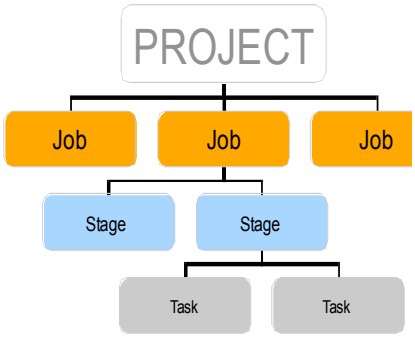
PROJECTS

The fourth tab from the left on the main dashboard takes you into the Projects area of Traffic. In this section we will look at creating projects, adding staff member's names, costs and expenses and timetabling a schedule. The Projects area also allows you to search through your active projects and produce related documents such as estimates and tenders, as well as raising invoices and purchase orders.

Projects - the structure

Projects

When you receive a new commission for work, a project is set up. A project is the overall title for all the work you are being engaged to do. A project is raised for one client, with one main contact, and billed to the same client.



Jobs

Projects can consist of many jobs. For instance, if you were commissioned to design all the materials for an advertising campaign, you might be designing leaflets, flyers, posters, display materials for exhibitions, web sites, etc. Each of these would be a job within that project. (Some projects consist of only one job, in which case both project and job might have the same name). When invoices are raised, there can be a separate invoice for each job, although you can invoice all jobs within a single project together if you wish.

Stages

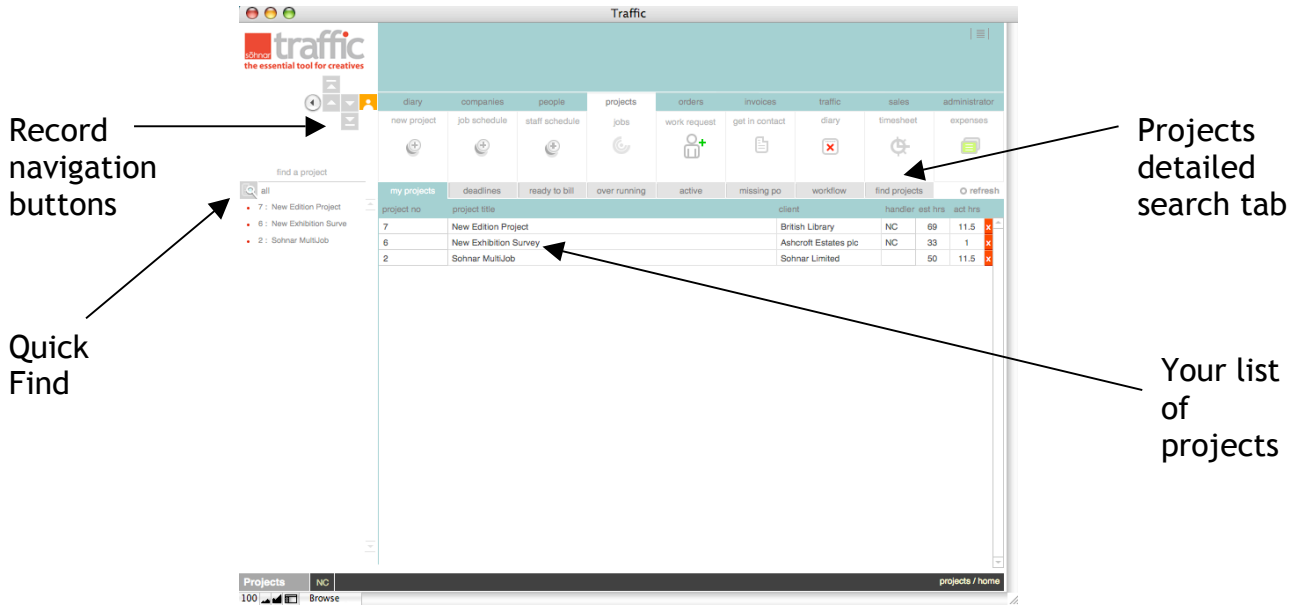
Jobs, in turn, involve many stages from concept to finished artwork. Stages are the components of a job that you decide on chargeable rates for and assign estimated hours towards. It is stages that studio staff will log hours against.

Tasks

Even within stages, it may be convenient to identify smaller work elements which in Traffic are called tasks. Tasks are most effective when a stage needs to be further divided up into elements that will need different staff working on them, possibly at different chargeable rates and to be done at different times.

This detailed structure enables Traffic to produce accurate schedules and estimates for you.

The main screen in the Project area of Traffic looks like this:



Finding Projects

In the Projects area, you can use the Quick Find window to search for projects with the following search terms:

Project Number – Search for any Project by looking for its unique number.

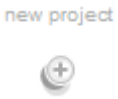
Company Name – The name of the client the project has been created for.

Project Name – Search by the title of the Project. This search can be done with just the first letters of the project name.

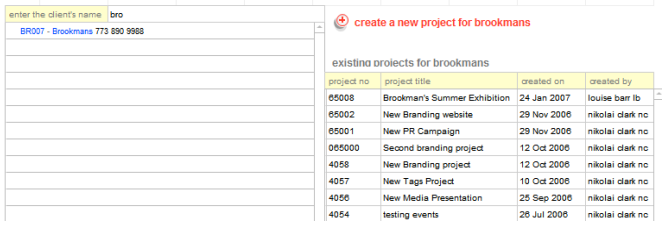
Note: There are more ways to find projects than using the quick find window, which will be covered in more detail later in this section.

Creating a Project

To create a project:



- From the Projects area, click the new project plus sign.
- You now need to choose which client the project is for. Type “all” into the field labelled “enter the client’s name” to list all the companies in Traffic, or type “clients” to see all your clients - or just type in the name of the client, or the Client Code.
- Select the client for this new project by clicking on their name in the displayed results (in blue).
- On the right of the screen, click the red plus button beside the “create new project for…”option.

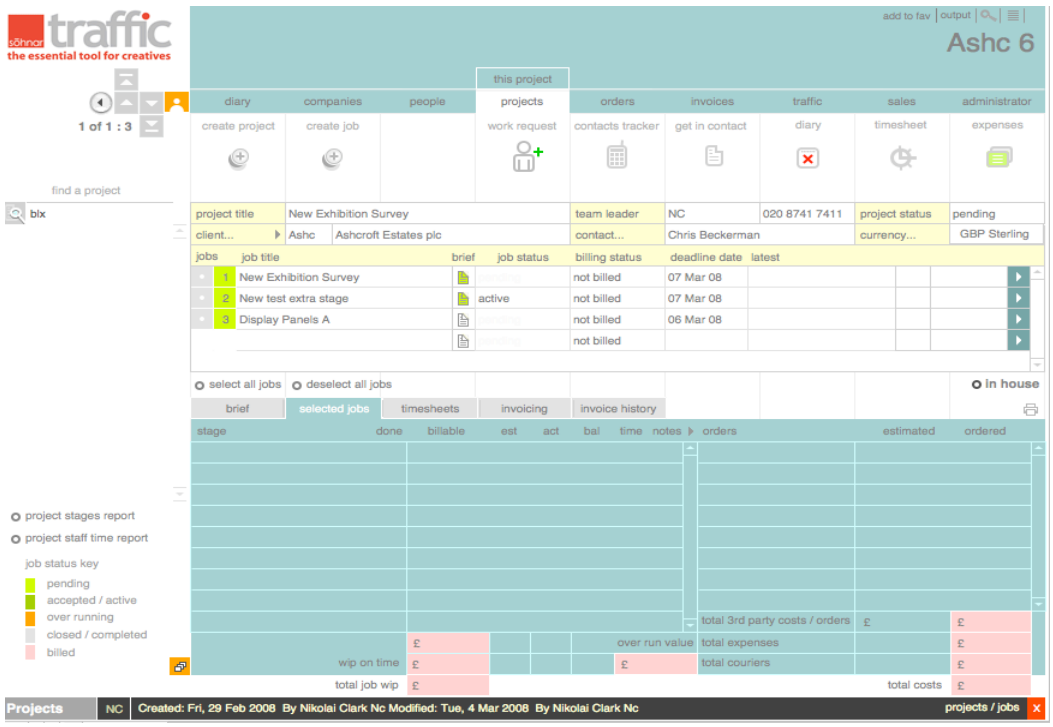


- Confirm to create a new project and type a name, when prompted, for your project.

Note: You can see all previously raised projects for this company listed on the right hand side when you click on their name in the display of search results. This may stop duplicate projects being raised, or just let you see at a glance what recent activity there has been with this client.

- Once you confirm that you are creating a new project you will be taken to the screen displayed below:

The Project Sheet



The Project Sheet is where you define the main settings of the project. This screen can be returned to at any time after the project is created as it contains the main project details, namely: project name, client name and client contact.

Project Number

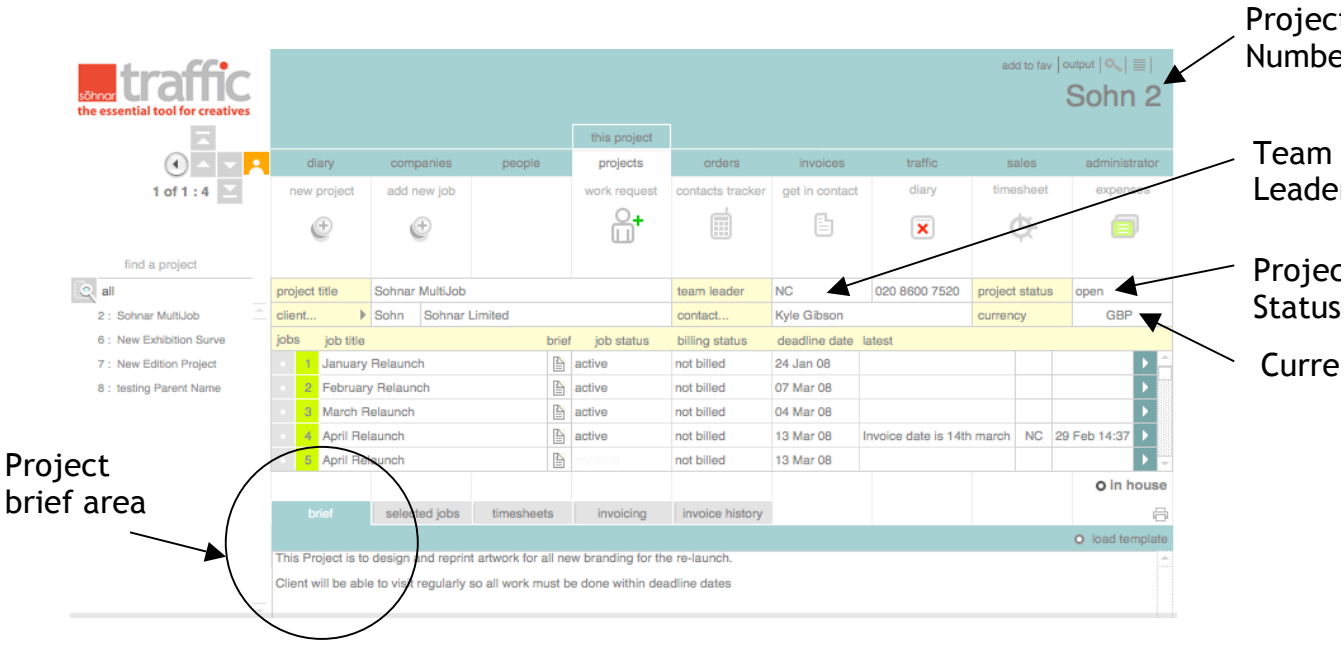
The Project number consists of the Client Code for the company who you have raised the project for, followed by a sequential number that Traffic assigns for you. These numbers can be set to start at any number you like - normally specified when your Traffic system first goes live - but once set they will not be reset again under normal circumstances. You cannot manually change the number of a project once it is created, although if you were to change the company Client Code at the Company record, it would appear renamed on all projects in the system, except of course for any documents already issued, so we advise that you check your company Client Codes before you raise live projects. Please contact Sohnar Support if you have any queries about this.

Adding details to a project

You can also add the name of a Team Leader, which should be the name of the person taking on overall responsibility for managing the project. The advantage of adding a name here is that projects can be searched for and reported on by the "Team Leader" field, but there is no other impact on the project other than this.

You can also amend the currency the project is being made in (it will default to GBP if you are in the UK, unless you have specified another currency as your standard). You MUST NOT change the currency of a project after you have started work on it – even after starting to make an estimate.

You can also add a Project Brief at this stage, by clicking the tab at the bottom left of the screen. This is a large notes field into which you can type (or paste) text.



Note: If you wish to upload ready-made documents, this can also be done in another area of the projects section, and will be explained later in this manual.

Project Status

Project Status lets you alter the status of the project to reflect how work(which is done at job level) is progressing.

As long as there are live jobs in the project, leave project status as “open”. This is the default status.

If all jobs in the project are suspended, set the project status to “oh hold”

If all jobs in the project are completed and billed, set the project status to “closed”

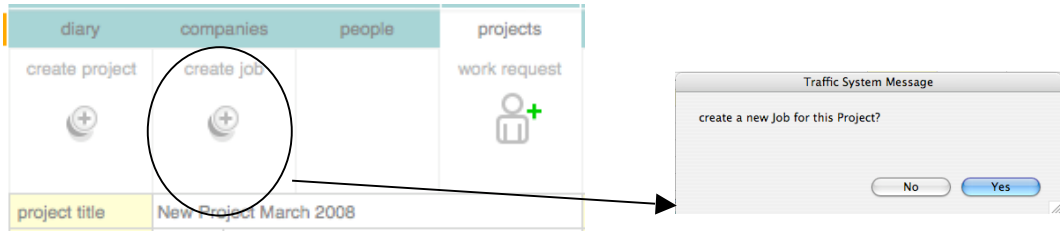
If you have made a back-up copy of data or documents from this project, set the status to “archived”. This status does not have any further function, so just use the term of closed or archived in any way that suits you. Closed and archived projects never disappear from Traffic, they can always be found again.

Project status has no effect on any reporting in Traffic, all reporting filters refer to JOB status, so feel free to change the project status whenever you feel it makes sense for you.

You are now ready to add jobs to the project. A project with no jobs is only an empty named folder or container, All costing and time scale settings are done at job level.

JOBS

Once the project has been created you will need to create the job(s) within it. To create a new job, click the plus sign at the top left of the screen marked “create job”.



Click to confirm the new job, and then type in the name of the job. The project name will be displayed (as a suggestion) in the job name field so overtype this if the job has a different name to the overall project. This only applies to the first job you create for any project, subsequent jobs created will have nothing suggested in the job name field.

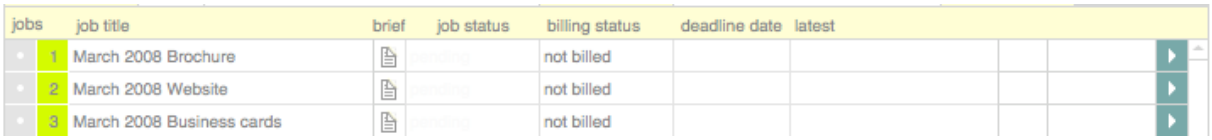
Job Number

A job takes on the number of it’s parent project, with the addition of a colon and then a simple extra number starting with 1, so that job numbers run sequentially depending on when they are created, for example a project number of SOH200 would have it’s jobs numbered SOH200:1, SOH200:2 and SOH200:3. You cannot manually change job numbers once they are created.

If you wish, you may carry on creating more jobs for the project - there is no limit, and you can create all the jobs before going into them and adding more details.

Adding Details to a Job

Once you have created your job, you can go into the job to add more details. The summary of all jobs within a project looks like this:



jobs	job title	brief	job status	billing status	deadline date	latest
1	March 2008 Brochure			not billed		
2	March 2008 Website			not billed		
3	March 2008 Business cards			not billed		

The job line on the project screen has two important icons on it.

On the left is the "select/deselect" icon. You will see this button elsewhere in the Traffic system as well, and it usually means that the row, or item in a list, is selected. In the projects summary screen, clicking this button will display information about the job on the project summary screen, which we will look at later. But it will not take you into the job screen.

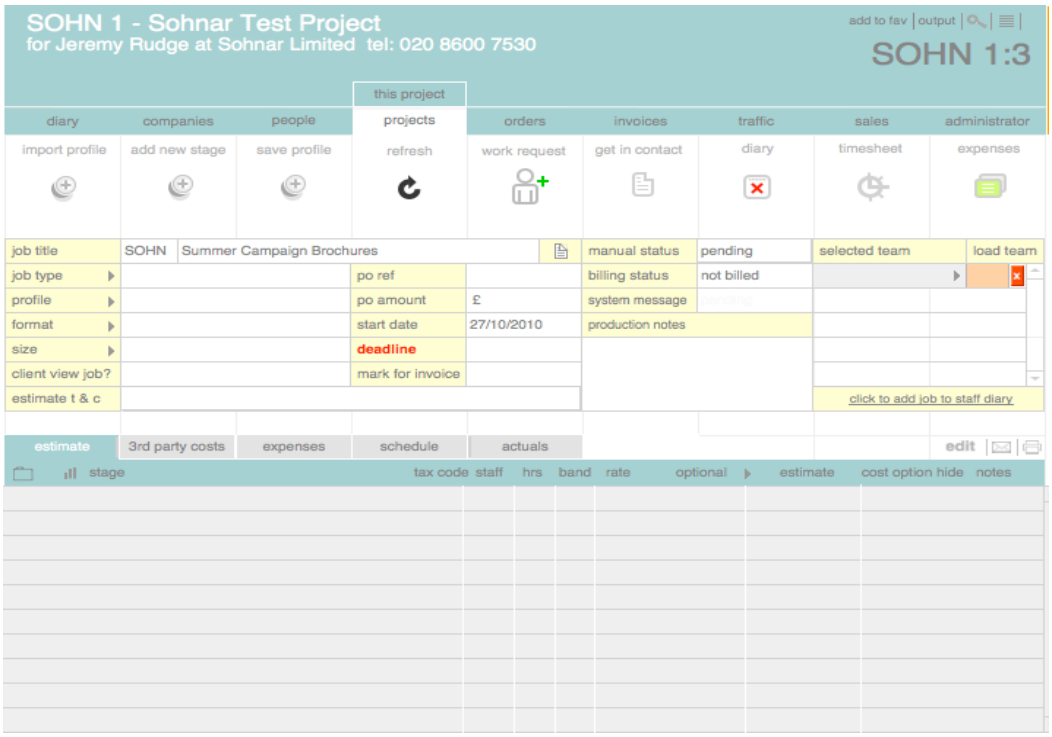
On the right of the line is the "go into" button. This also appears in many other areas of Traffic, and it usually takes you further into a record or line item (usually a different screen). Clicking this on a job line takes you into the full job screen.

Note: You do not have to click to select the job before you use the "drill into" button - they work independently of each other.

Each job line has a notes field icon. This icon appears elsewhere in Traffic and marks a space where notes can be typed. In this area, the notes field is designed to hold the Job Brief (you can also access this notes field within the job screen). If you wish to type a Job Brief into the notes field, just click on the icon to open the notes window.

The Job Screen

The main job screen displays the job number in the top right hand corner (in this example it is 5:5, which means job 5 in project number 5). The job title is displayed in the top left of the central area, and here it can be edited if needed.


SOHN 1 - Sohnar Test Project
for Jeremy Rudge at Sohnar Limited tel: 020 8600 7530
add to fav | output
SOHN 1:3
this project
diary companies people projects orders invoices traffic sales administrator
import profile add new stage save profile refresh work request get in contact diary timesheet expenses
job title SOHN Summer Campaign Brochures
manual status pending
selected team
load team
job type
po ref
billing status not billed
profile
po amount £
system message
format
start date 27/10/2010
production notes
size
deadline
client view job?
mark for invoice
estimate t & c
click to add job to staff diary
estimate 3rd party costs expenses schedule actuals
edit
stage tax code staff hrs band rate optional estimate cost option hide notes

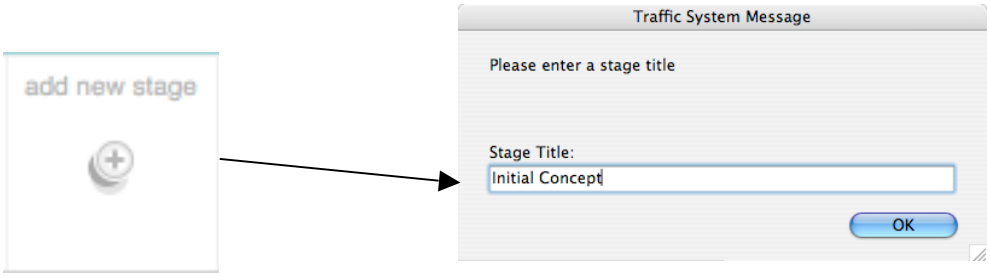
This is the screen in which you will build an estimate, and to do this we need to add stages to make up the job, and determine how much we are going to charge for each stage.

Building an Estimate

Estimates are made up of stages, which you define and name. You also allocate staff to do work against these stages, and decide how much to charge your client for each stage. There are two ways to do this: Build an estimate by hand and manually add each stage and name them individually, or bring in saved, ready made estimates of work that you do frequently, which are known in Traffic as Profiles. There may also be outsourced work on the estimate, known as 3rd Party Costs in Traffic, and expenses too. But for now, we will start by planning just the studio work required.

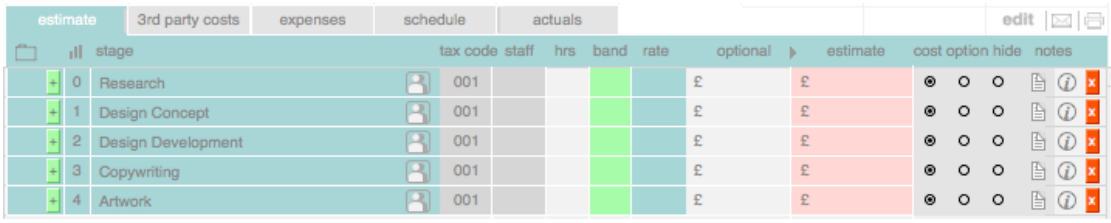
Manually created estimates

To manually build an estimate with stages, start by clicking on the “add new stage” plus button at the top of the screen. You will be asked to type the name of the stage in the box that appears.



Once named, the stage will appear in the lower part of the screen, and it is now ready for you to add more details. You may wish to add all the required stages before you start building the costs into your estimate.

Here is an estimate that has been built up of four stages.

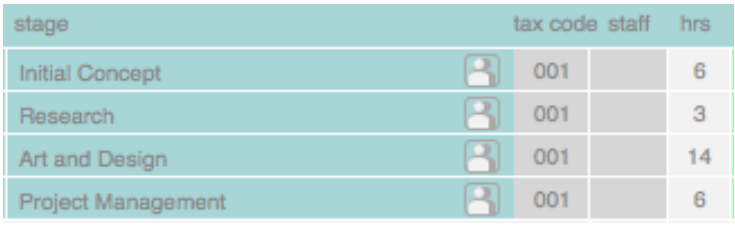


To estimate the cost of each stage the two fields that you need to type information into are the “hrs” field and the “band“ field.

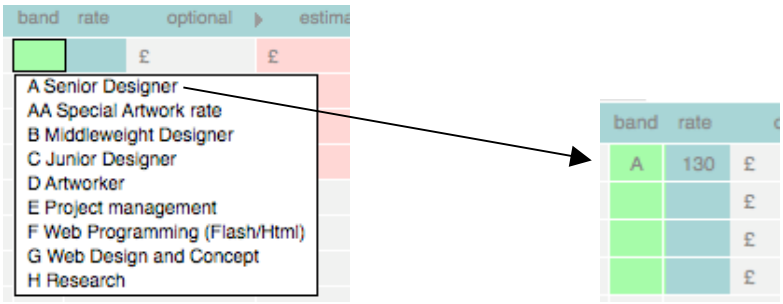
- The “Hrs” field is for you to estimate how many hours of work you estimate it will take to complete the stage.

- The “Band” field is for you to enter the hourly rate you charge for this type of work. Both of these fields must be filled in for Traffic to calculate the chargeable amount to go on your estimate.

To fill these in, simply click into the “hrs” field and type the amount of hours as a numerical value. You do not need to work just in whole hours, you can type values with decimal points to enter smaller periods of time, for example half an hour would be 0.5, and so on. Bear in mind that these are decimal fractions, so fifteen minutes would be entered as 0.25 not 0.15.

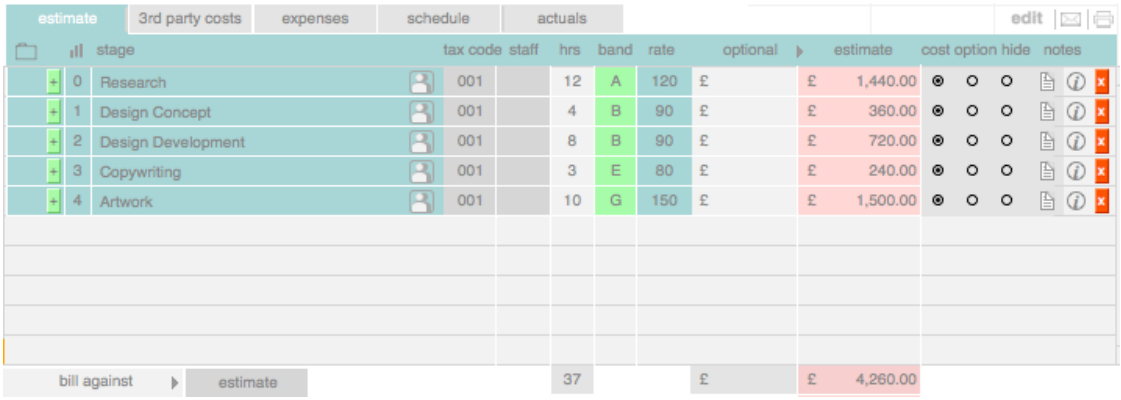


Next, you need to add your hourly charge rates. The “band” window contains a drop down of all your hourly rates, which are known in Traffic as chargebands. These are set up in the Administrator area of Traffic, and will be discussed in more detail later on in this manual. Use the drop down to select the chargeable rate you are looking for, and once selected, you will see the hourly rate set for this band. In the example seen here, the rate for a Senior Designer has been defined as chargeband A, which is set as £130 per hour.



Note: Chargeband values can be overwritten manually in the “rate” window, but if you do not see the rate you want, to use it is better to set up a correct chargeband in Administrator before creating the estimate.

A completed estimate of studio hours might look like this:



		stage	tax code	staff	hrs	band	rate	optional	estimate	cost	option	hide	notes
+	0	Research	001		12	A	120	£	£ 1,440.00	◉	○	○	
+	1	Design Concept	001		4	B	90	£	£ 360.00	◉	○	○	
+	2	Design Development	001		8	B	90	£	£ 720.00	◉	○	○	
+	3	Copywriting	001		3	E	80	£	£ 240.00	◉	○	○	
+	4	Artwork	001		10	G	150	£	£ 1,500.00	◉	○	○	
		bill against estimate			37			£	£ 4,260.00				

You can see that Traffic uses the hour and chargeband figures to calculate the estimated billable amount for each stage of work within the job. The totals appear on each stage line, under the column header on the right marked “estimate”. These totals will appear on your estimate document.

The total of all stages added together appears at the bottom of the screen. (Click the “refresh” plus button at the top of the screen to update this total after making changes to any stage lines) This figure will appear on your estimate document, usually at the foot of the page after the totals for the stages have been listed.

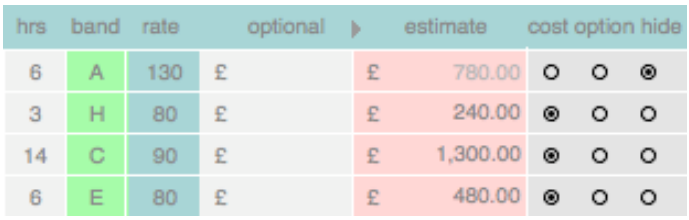
Further options: Cost, Option and Hide

You may decide to offer your client some stages as options. By clicking the radio button marked “option”, you can display the selected stage in the estimate slightly differently (with it’s price displayed as an option, or in another column – the appearance depends on your requested preference) and the chargeable amount for the optional stage will be subtracted from the overall (total) figure. Items marked as options in this way can be reverted to “cost” items at any time (after client approval, for example), which will put them back in line with other stages and included in the total figure again.

In this example, the second stage line has been marked as an option, and can be seen on screen clearly moved into the column marked “optional”.

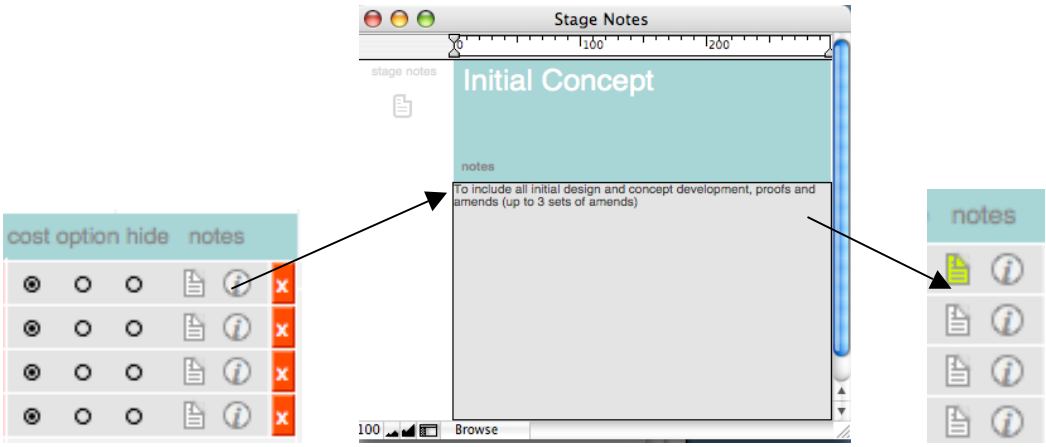
hrs	band	rate	optional	estimate	cost	option	hide
6	A	130	£	£ 780.00	◉	○	○
3	H	80	£ 240.00	£	○	◉	○
4	D	80	£	£ 320.00	◉	○	○
6	E	80	£	£ 480.00	◉	○	○

The “hide” function can be used to remove all reference to the stage on an estimate, but still keep the record in Traffic. It may be used to add stages that you wish staff to work against, but that are not to be shown or billed to a client. It can also be useful to look back and see that an option was once offered and then declined. Stages that are “hidden” do not make up the total value of the estimate.



Notes

Each stage line has a notes field. If the single line description is not detailed enough, you can use the notes field to enter further supporting information about the stage. This field is usually configured to appear on your estimate as standard.



Note: The notes field changes colour to inform you that text has been entered.

Adding Tasks

You may wish to subdivide any of the stages into what are known as tasks. Tasks are useful if a stage consists of specific, separate components, which you wish to list individually on your estimate. They are of particular importance if you plan to allocate different staff and different chargeable hourly rates to sections of work within one stage.

An example may be as follows:
Stage name – Art and Design
Tasks – Initial artwork, refinement, presentation artwork.

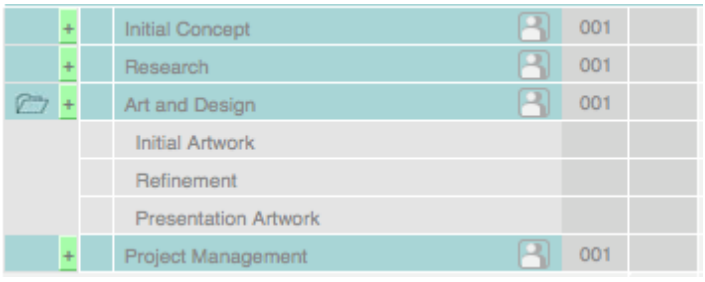
To add tasks to a stage, click on the green " + " icon on the stage line, and you will be asked to name the task.

You can carry on clicking the green plus icon and add as many tasks as you need.

A stage with tasks can be easily identified by the presence of a folder icon on the far left. Once added, you can view the tasks by clicking this icon.

Stage with tasks (hidden)

Stage with tasks (displayed)



Estimating stages with tasks

By using tasks you can clearly define the work being done within a stage, and allocate these tasks to specific staff later on when you schedule the job. For this reason, when you add tasks to a stage it is very important that you calculate the estimated costs from the task lines and not from the parent stage.

To do this, you should remove all hours from the “hrs” field of the parent stage line, and instead enter an amount of hours for every task to be done. As you do this, you will notice, that Traffic automatically calculates the total of these hours for you, and this appears in the stage “hrs” field above. Use this to work out how many hours each task needs to meet the required estimated hours you want the stage to be made up of.

You must also now add hourly chargebands to each task. These can be different to each other, or all the same. In this way you can create an estimated price for the stage, which is the result of several smaller, combined components.

The illustration below shows a stage called Artwork and Design made up of 14 hours of work charged at different rates, which appear as tasks. The 14 hour total is auto-calculated.

Note: When you use tasks, the chargeband for the stage ceases to appear in calculations and it can be ignored. Only hourly rates against the tasks will be included in your estimate total. For this reason it is important that you do not type anything over the auto-total that appears in the stage “hrs” column.

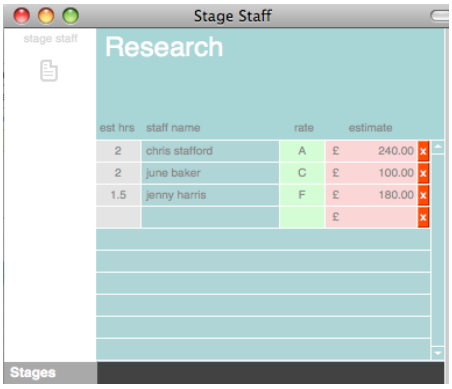
Tasks do not have to be client facing. You may wish to divide a stage of work up into tasks purely for internal planning, in which case you do not have to show tasks on your estimate.

By revealing or hiding the tasks in the estimate screen in Traffic, you can decide whether they show up on the outgoing estimate document. Use the folder icon to display or hide the tasks before you print your estimate, and it will appear accordingly. This gives you the freedom to make estimates with different levels of detail for different clients.

Please note that the radio buttons for “option” and “hide” cannot be applied to tasks.

The “add team” icon
You can also cost out a stage by adding staff members. This is done by clicking the “team” icon which is on each stage line (estimate view only):

Clicking the icon opens up a smaller window, which you can use to add several staff members to a stage. You must have loaded a “team” of staff names to the job in order to do this. Loading a team is discussed in the section of this manual on Scheduling.



Use the lines inside the box to add the following details:

1. Add number of hours (do this first)
2. Add staff member (can only be selected from team loaded against the job)
3. Add a charge band
4. Close window

Completing this process will give you a stage calculation based on the people working on the job at specific charge bands.

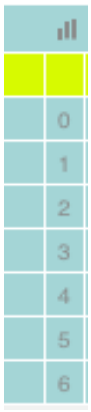
Please note that this function is only for working out the costing of the job. If you use this method to add staff to stages, you CANNOT do staff scheduling in Traffic. Traffic scheduling requires the use of staff initials in the “staff” column, which does not happen with this option (the staff column is filled with the word “team”). For this reason, most users are advised to create tasks to accommodate multiple staff against a stage.

Changing the order of stages

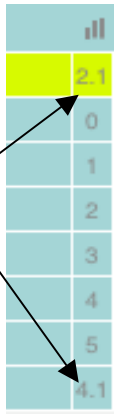
After creating your estimate, you may decide that your stages are not in the right order. This is easy to change.

Each stage has a field on the far left of the line that can contain a numerical value. This is used to sort the stages into a preferred order. To change the order, simply re-number the stages so that they are in the correct sequence. Once you have done so, click the small "graph"-style icon at the top of the number column to re-order the rows.

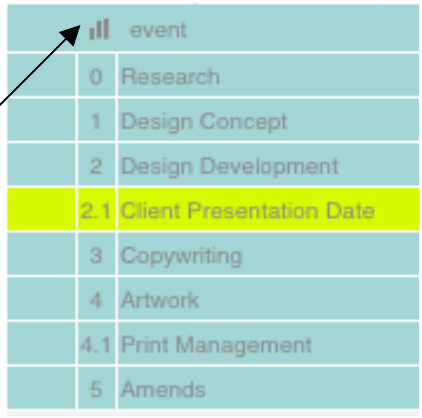
1. Unsorted stages



2. Re-number



3. Click sort button to put stages into order



This numbering sequence is very flexible. Note how in our example we numbered the stages with decimal points. So to insert a stage between 2 and 3, we called it "2.1"

You can of course re-number the whole list with whole numbers. You do not have to include "0", but if you do, it will fall before "1". You can also include negative values, such as "-1" and "-2", which will add stages before the "0". If any stages are deleted, the remaining numbers will remain in sequence even if there are gaps.

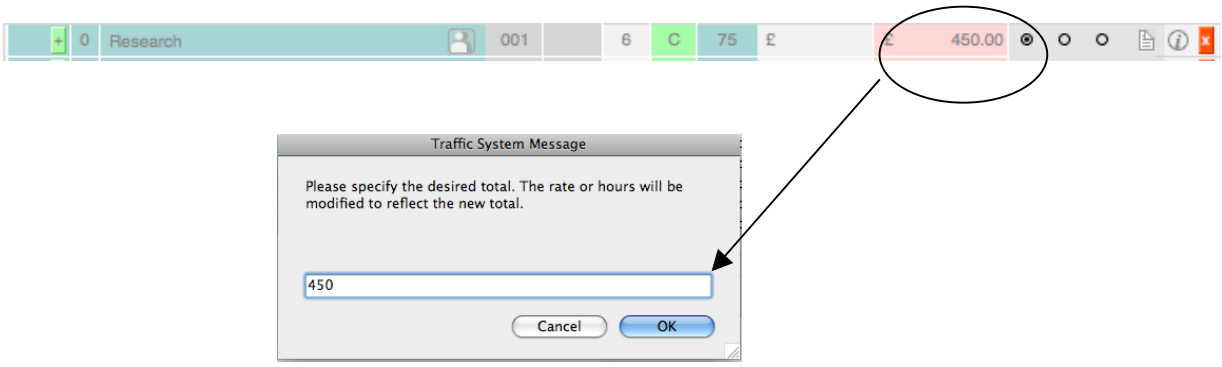
Note also that tasks can also be re-sorted, but only within the stage that they belong to.

Sorting the stages affects the order they appear in on the customer quote, and it will also help you later in creating a schedule (covered later in this manual)

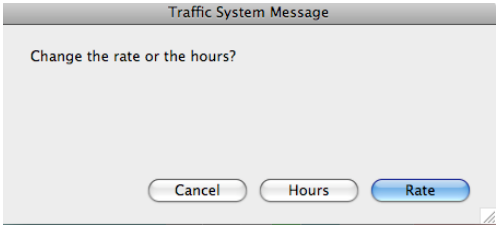
Further adjustments to price

You may wish to alter the price of a stage or task in Traffic to a set amount but find it difficult to work out how to calculate it exactly. Traffic allows you to simply type your own price into the "estimate" cost box, and the system will adjust either the rate or the hours for you to achieve it:

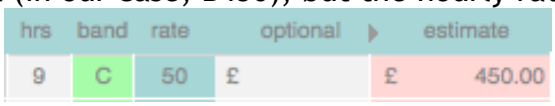
1. Select a stage line and click into the "estimate" field on the right, and a dialogue box will appear:



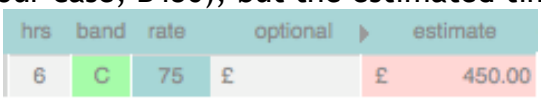
2. Simply type the price you want into the box, and you will be asked how you wish this result to be calculated:



If you click "hours", the time you estimated will be adjusted to achieve the desired result (in our case, £450), but the hourly rate won't change.



If you click "rate", the chargeband value will be adjusted to achieve the desired result (in our case, £450), but the estimated time won't change.



Bear in mind that by doing this you may create new time or cost figures that are not whole numbers.

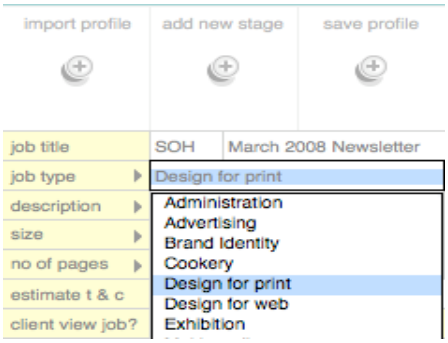
Creating Estimates using Job Profiles

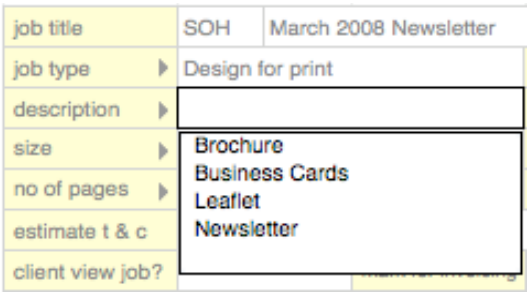
The second way to create an estimate is to use a ready-made job profile. It is far quicker to raise an estimate using profiles, and you will be able to quote in seconds for jobs that you have done before. These are stored in the administrator section of Traffic and are pre-built templates made of all the stages and tasks needed for jobs that you do frequently. A whole library of profiles can be created and stored, and they can be used over and over again. Creating profiles will be covered later in this manual, under the Administrator section. Here, we will look at using them.

Importing profiles

To import a job profile, you must define the type of profile you wish to bring in by using the fields at the top area of the main job screen.

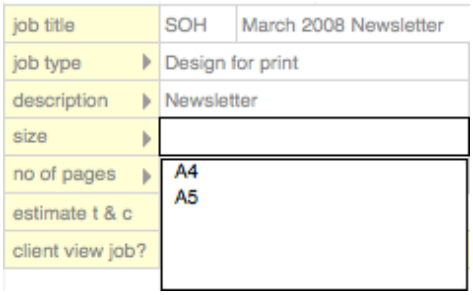
Begin by defining the "job type". All your profiles must come under one of your main job type headings. These are typically things like "design for print", "design for web", "brand identity" and so on. In other words, the master category under which all variations of this type of work will be classed. For our example we will choose "design for print".



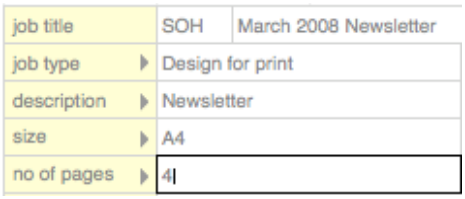


Now you need to choose the actual profile. In the white window beside "description", choose the job profile you want from the drop down. The drop down will show different selections depending on which job type has been set. For our example, we will choose "Newsletter".

You may find that no further drop downs are required to import the profile you are looking for, however some job profiles are divided again by more criteria, such as size or format. If you click into the drop down under your chosen profile and see options like these, you must select the appropriate one to proceed. These options mean that more than one template exists for the chosen profile. In our example, you can see that profiles have been made for A4 and A5 newsletters. We will choose A4.



Note: The label on the format window will vary depending on the master job type chosen.



Finally you need to set the value of any variables within the chosen profile. Variables could affect stages of work that will change depending on things like quantity or size. For example, work required to create a printed brochure might vary based on the number of pages, and work required in creating display stands might vary on the quantity of stands being. In our example, we will set the number of pages for the newsletter to 4.

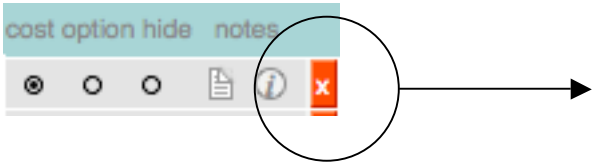
We are now ready to import our chosen profile. Click on the plus button marked “import profile” at the top of the main job screen to import the profile. You will be asked to confirm the action, as an imported profile will always replace any existing stages on the screen. Click “yes” to proceed.

Note: Do not over-write the drop down options with your own choice of descriptions before trying to bring in a profile. The drop-down fields show you what is currently in the Administrator area, so changing these fields before trying to import the profile will not work because the system will be unable to find a match.

An imported profile can contain all the stages required for the chosen job type. The stages can already be divided into tasks, and all the hrs and charge bands columns can be filled in. The notes fields might also be filled in. With all this work stored as a template, you can see how much faster it is to use job profiles instead of manually creating new estimates every time you quote for a job.

Amending a Job profile

As all situations might be different, imported profiles can be freely amended once they have been imported, to suit the job being quoted. All the details in the hours and chargeband fields can be changed, and stages and tasks can be added or taken away. To delete any stage line, simply click on the red " X " button on the right hand end of that line.



Click here to delete line

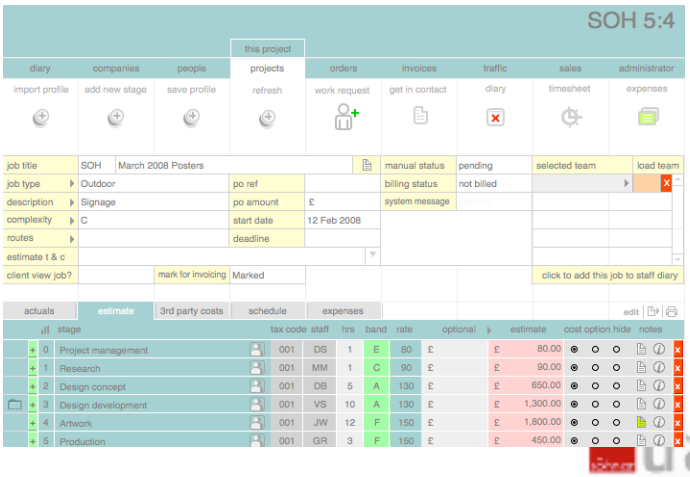
To add extra stages, use the "add new stage" plus button at the top of the main job screen. Remember you can use the number boxes to the left of each stage name to re-number and re-order the stages after adding new ones.

Bear in mind you can use all the other methods described above (change order of stages, use "option" and "hide") to alter a job estimate after importing a profile

Note: Amending a profile after importing it to the job screen has no effect on the saved template, which will remain the same. To permanently alter a profile, you must go to the Job Types section of the Administrator area.

View Your Estimate

As soon as you have some stages and chargeable figures in Traffic, you can preview your estimate to see what it will look like. An estimate can be previewed, refined, sent out and updated as often as you like.



To produce an estimate document, click on the icons on the far right of the estimate screen.

The “edit” button allows you to view the Estimate document and make adjustments to its appearance. Not all areas of the document can be edited.

The “email” button allows you to send the estimate to your client as an email directly from Traffic.

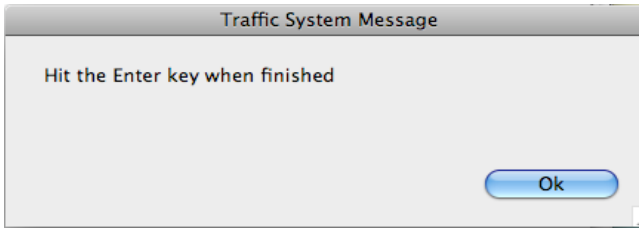
The “print” icon allows you to print the estimate.

Both the print and email option give you the choice of whether the document should bear your company letterhead before you issue it. This can be decided on every time you issue an estimate, even if you have already previously issued it. The letterhead details set up for you are held within Traffic, and can be seen in preview mode.

Like all Traffic documents, your estimate will be created to your own specifications; therefore this manual will not cover the appearance of the document. However it is important to know that every time an estimate is emailed or printed, a copy of the document will be automatically saved by Traffic as a PDF.

Previewing documents

In Traffic, you will often be looking at documents in preview mode, which might temporarily hide the other screens of Traffic and give you no visible buttons to quit the preview. In these cases, the way to revert back to the normal Traffic screen is to hit the ENTER key on your computer. Most previews give you a warning of this with a message (shown right), which appears just before you go into the preview.



As a general rule, DO NOT try to quit preview mode by clicking the close icon “X” on a PC or red “X” on a Mac. If the main Traffic screen has been hidden for the preview, pressing the “X” button will close the preview and there will be no way of returning to the main screen, so basically you will have closed Traffic.

To avoid this possibility (and if in doubt) always press the ENTER key in preview mode once you have finished, and you won’t have to log into Traffic all over again.

Email an estimate

When you choose the “email” option to issue your estimate, you will be presented with a contact record window before the email is actually sent. This is treated by Traffic in the same way as any other emailed contact record, so note the following details:

The job number is automatically attached

The email subject line is automatically filled out (you can change this)

The project contact’s email address is automatically filled in

You are automatically bcc’d in on the email

The pdf is automatically attached

More Options:

- Check email options – cc or bcc any other names as required.
- You can write a personal message before sending the email in the email body area.
- Add more attachments – the estimate document is automatically attached to the email (It does not appear as email body text), but if you want to add further documents, click the “attachments” button again to select more documents.
- Select a template using the plus button at the top right of the window. You can save commonly used messages (ie “Please find your estimate attached..” etc) as templates and load them whenever you need them. Creating templates is explained in the section on the Administrator tab later in this manual.
- Follow up – You can add follow up actions as with any other contact record.

Remember - You must click on the email out icon to actually send the estimate. If you simply close this window, the email record will still be saved - but not sent.

The contact record has a sent status window that will change to reflect the sent status of the email. If this window is blank, you will know that it has not been sent.

3RD PARTY COSTS

Apart from internal fees, you may also want to add external costs to your estimate. These may be costs to get something printed or constructed that you outsource. Typically they are things you have to order, and in Traffic terms, this is what separates them from materials and studio supplies which may also count against a job. These other miscellaneous costs are called expenses. The difference between 3rd party costs and expenses is that 3rd party costs need to have a purchase order.

There is a separate area in the Job screen where you can add these 3rd party costs.

On the main job screen, click on the tab marked "3rd party costs" which is just to the right of the tab marked "estimate".

This will display the costs area, where you can enter details of outsourced work that you wish to include on your estimate.

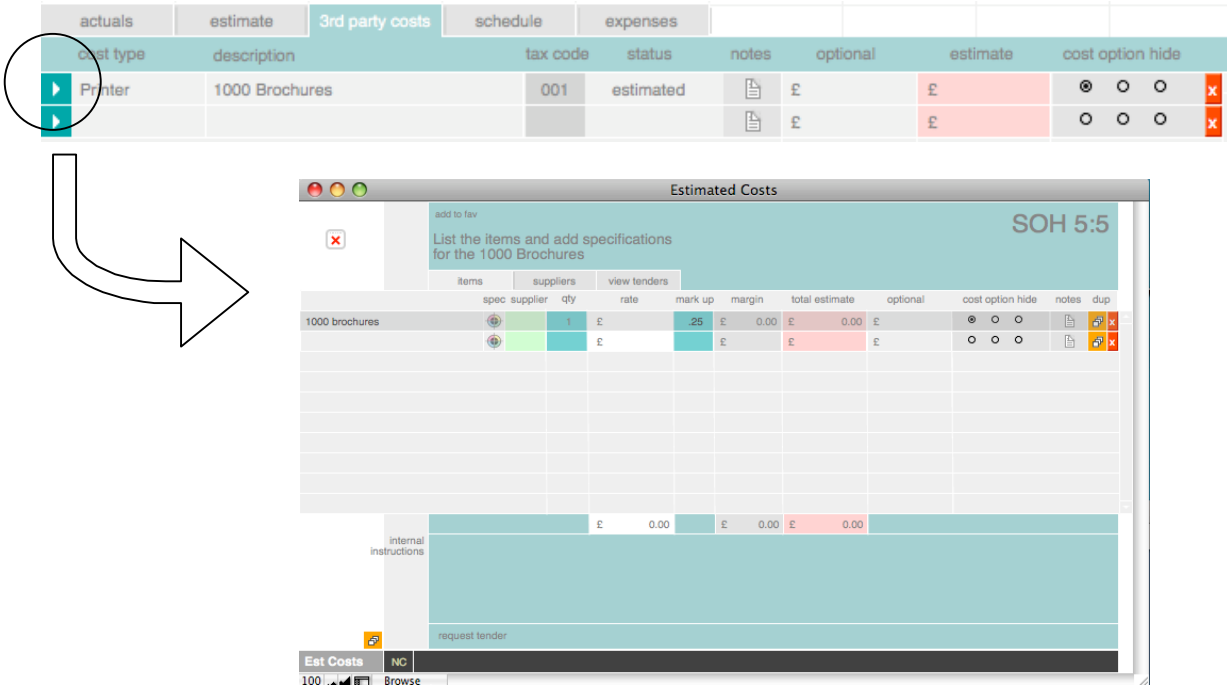
To begin the process, click in the first field on the left under the header "cost type" to select the type of work you wish to add to the estimate. The field will contain a drop down window from which you can select the cost type that you need.

This list is made up of the terms you have used in your company records when you defined Supplier Type. If you wish to add a cost and the cost type does not appear in this window, you should go back to your company records and make sure that you have correctly labelled the supplier type of any companies with the cost type you are looking for.

Note: Do not manually type the required cost type into this window, as when the time comes to order or tender it out, you will have no company in Traffic to send the request to. Always make sure the correct company exists in Traffic before going past this stage.

Next, you need to add a brief summary of the cost into the next field, marked as “description”. This will appear on your estimate, invoice and associated orders, so remember that both clients and suppliers will see it.

To enter details of the cost for the item, you need to open up the Estimated Costs window. Click on the green “go into” button on the far left of the line item to open this window.



The estimated costs window allows you to write in supplier costs and chose suppliers to send tenders to. It is important to understand the different options that are available within this screen.

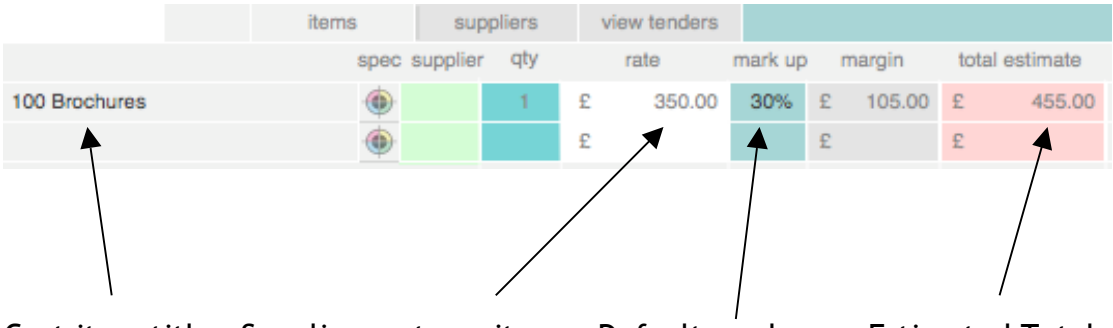
1. You can select the cost rate yourself for a single cost item so that it appears on your estimate quickly and easily.

2. Or you can prepare a tender document and get quotes from suppliers before giving your client the estimated cost.

3. Going further, you can also make costs with options for variations of the same thing, i.e. different quantities or sizes for example, and get price quotes for each option.

Adding costs to a Job

To add an estimated cost yourself, simply type the figure into the field marked “rate” on the cost line in the estimated costs window.



Cost item title Supplier cost per item Default mark up Estimated Total

Note that we are not entering any supplier details when using this quick method of estimating costs.

Once you have entered the rate, you can see how much the cost will be marked up by, and the amount that will appear on your estimate. In the example above, a cost of £350 has been entered for the 1000 brochures, which has been marked up by 20%, making a billable amount of £420.

Mark-ups

Mark up rate can be set in the Administrator area of Traffic. A single global default can be set up for all 3rd party costs, and this will be automatically applied every time you enter a new cost item, like in this example. You do not have to use the default mark up, the figure can be manually over-typed with any amount you choose on a job-by-job basis.

If you wish to type in a new mark-up rate, it should be written as a decimal, for example, 20% must be entered as 0.20, and 35% would be 0.35.

Note: Do not type a whole number: 25 would not be a 25% mark up, but 250%!

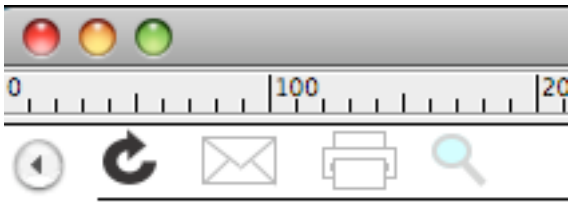
Note: You can also type in a margin value rather than a calculation. In the example below, “50” has been typed into the margin column to add a round £50 to the print cost. Notice that the mark-up figure automatically adjusts to reflect the amount of the mark-up.

Once a figure has been entered, the cost can be brought onto the estimate. To see the estimate, go back to the “estimate” tab and use the icons on the right of the screen to open and preview the document.

IMPORTANT:

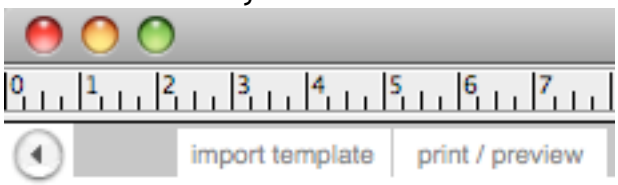
Remember to refresh your estimate document every time you make amendments to it in Traffic, otherwise it will remain the same as the first time you raised it. The refresh function appears at the top of the estimate layout, and is visible when you open it in “edit” mode:

1. Back button (closes preview)
2. Refresh button
3. Email docment
4. Print document
5. View in preview mode



Some older versions of Traffic may have a document layout that looks like this:

1. Back button (closes preview)
2. Import template –(refresh)
3. Print (includes email) or preview

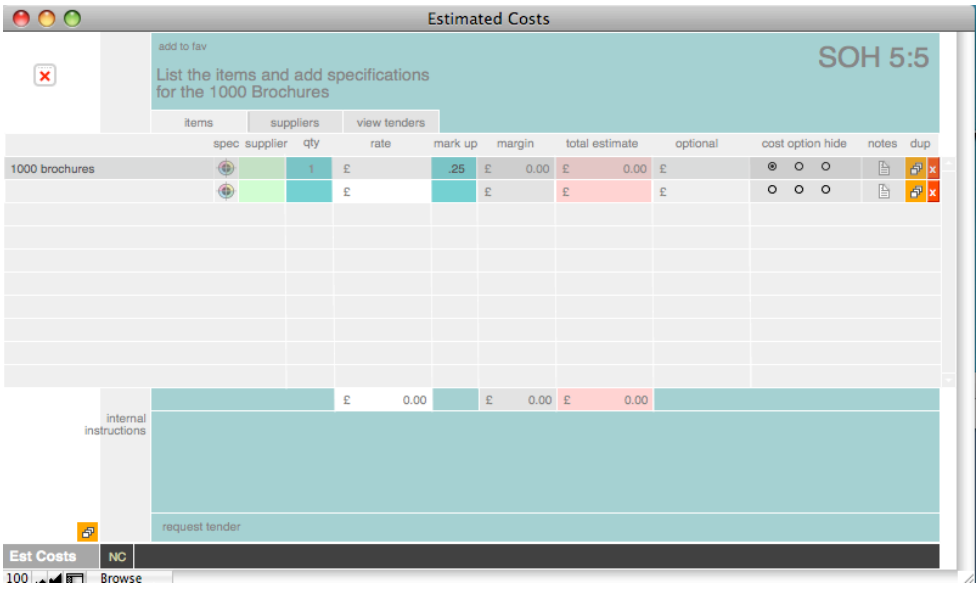


Your estimate should now consist of estimated studio fees, and estimated third party costs together.

The next section will deal with another way of adding costs to your estimate, which is tendering them out to suppliers for quotes. For this you will need to have all the required suppliers set up in your company records, with the correct “supplier type” filled in.

Tendering

As with the first example above, you need to start the process by entering a new cost line and opening the Estimated Costs window.

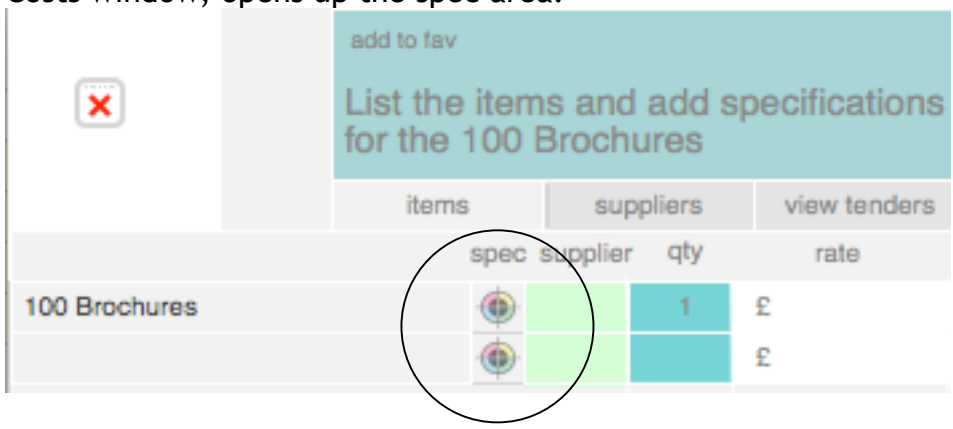


But this time, we will be contacting suppliers for their quotes before filling in any values.

Adding a spec

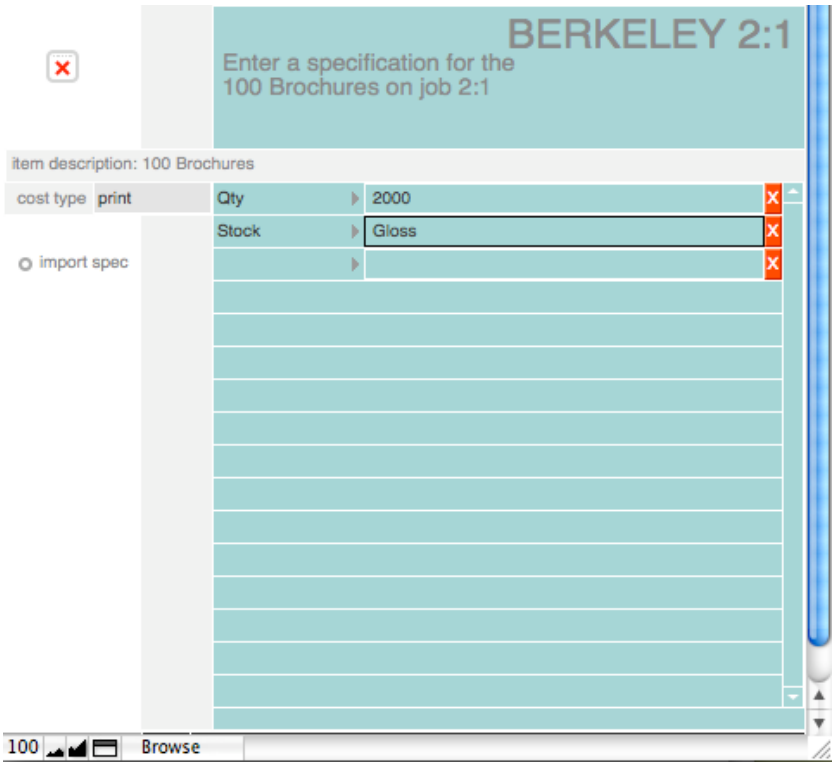
The first thing you might want to do is create a detailed spec for the job. Traffic allows you to build specifications in as much depth as you need, so that suppliers can quote for exactly what you want.

Clicking on the “spec” target icon, which is found in the main Estimated Costs window, opens up the spec area:

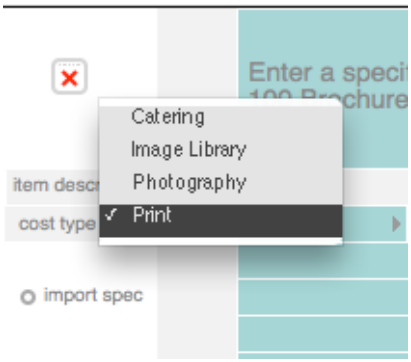


This will open up another smaller window, in which you can build your spec details.

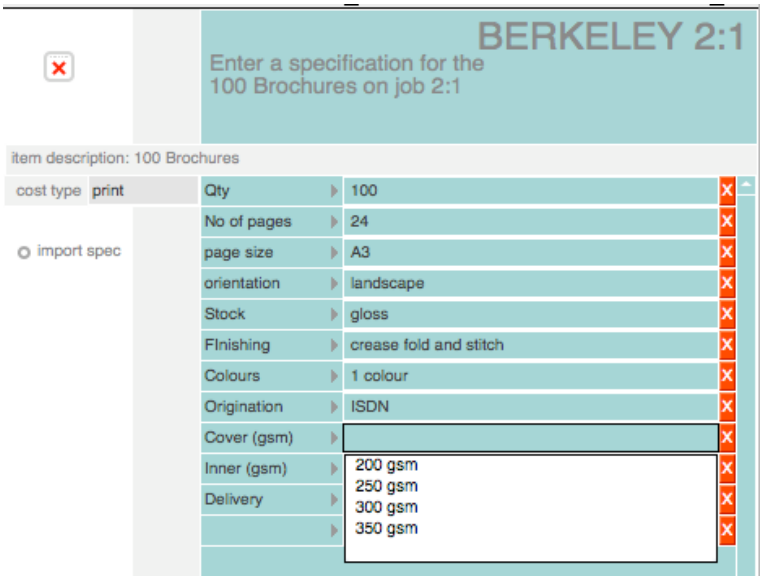
To create a spec manually, simply free type definitions and requirements into the available fields within this window. You may find that drop downs have been pre-set into these windows, this will depend on whether these options have be created in advance in the Administrator area of Traffic. Add as many lines as you require.



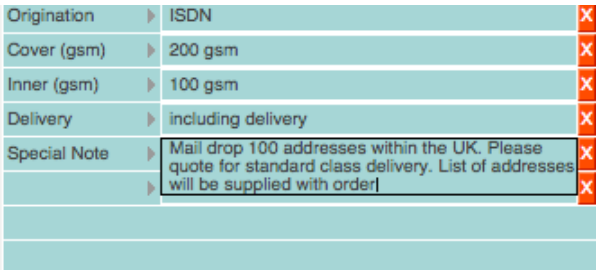
To use a pre-built spec template, click into the box labelled “cost type” on the far left of the window. If spec templates have already been created you will be able to choose from one of them. In our example there are four to choose from:



Select one of the templates, then click on the radio button underneath labelled “import spec”, and a pre-defined list of options will be loaded onto the screen/. You can now select the correct details against each header shown in the left column, by typing your requirements (or selecting from a drop down, if available) into the right hand column. Any lines not required can be deleted. New options can be added by free typing into any fields.



You can also type into the first empty line below the spec list to create new entries. This may be special instructions or notes pertaining to just this job. Although the window on the right is small, you can type whole sentences into it, and these will be fully visible to the supplier.

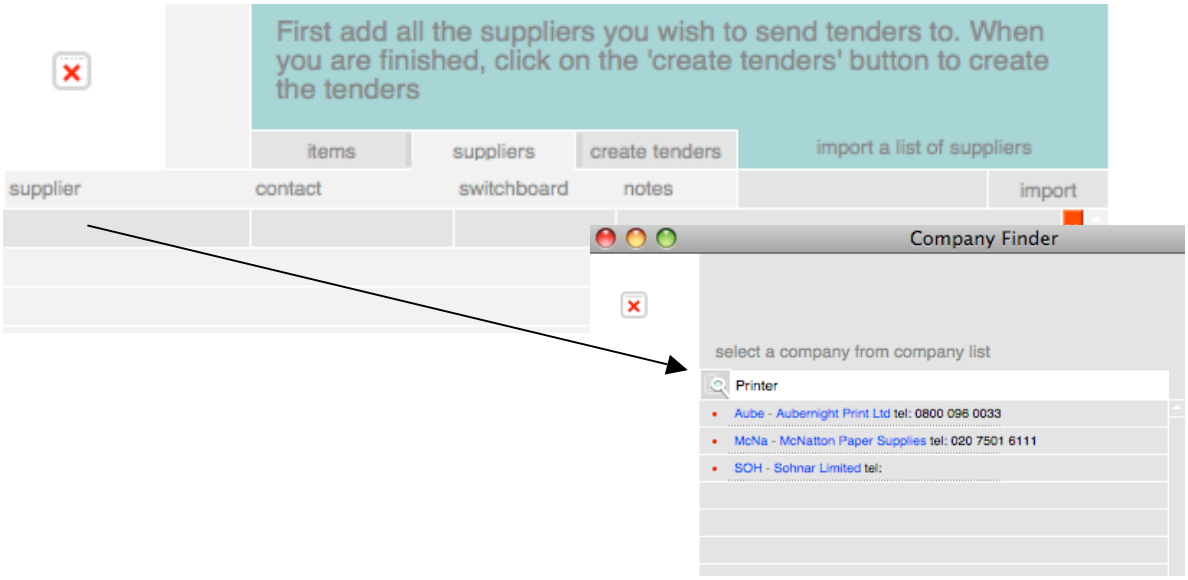

Origination ISDN
Cover (gsm) 200 gsm
Inner (gsm) 100 gsm
Delivery including delivery
Special Note
Mail drop 100 addresses within the UK. Please quote for standard class delivery. List of addresses will be supplied with order

These pre-built spec templates are created and managed in the Administrator tab of Traffic. This will be explained in the section on the Administrator area, later in this manual.

Close this window when you are happy with your spec, and you are ready to start adding suppliers.

Adding Suppliers

To do this, start by selecting suppliers. Clicking on the tab marked “supplier”, which is above the cost item line, displays the supplier area as below:

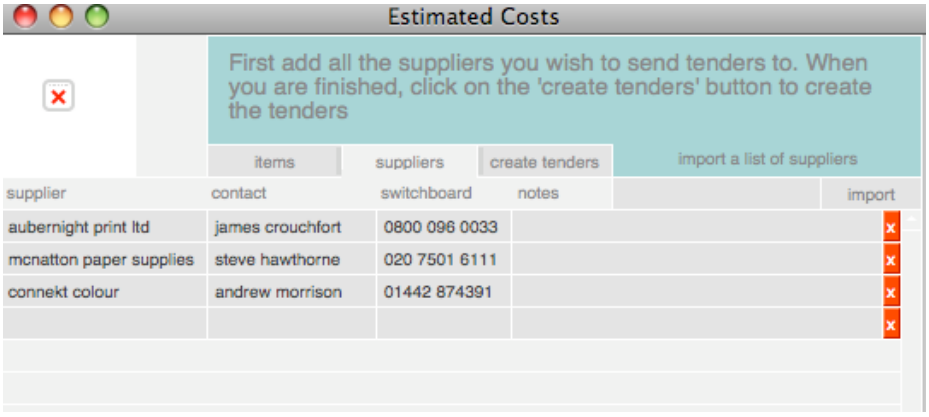

First add all the suppliers you wish to send tenders to. When you are finished, click on the 'create tenders' button to create the tenders
items
suppliers
create tenders
import a list of suppliers
supplier
contact
switchboard
notes
import
Company Finder
select a company from company list
Printer
Aube - Aubernight Print Ltd tel: 0800 096 0033
McNa - McNatton Paper Supplies tel: 020 7501 6111
SOH - Sohnar Limited tel:

In this window you can select suppliers by clicking into the window headed “supplier”. You will be presented with a list of suppliers that fall under the supplier type for the cost that you are entering, which in our example would be printers.

Note: If the supplier you need is not automatically displayed here, you can still use the white field to search for any company stored in your Traffic system.

On the same screen you will also be required to select a member of staff at the company to address the tender to (staff members are listed on the right). You will not be able to use a supplier that has no records of any staff members, as Traffic needs to be able to link the outgoing document to a person as well as a company name. Once the staff name has been chosen, the supplier details will be entered into the cost window.

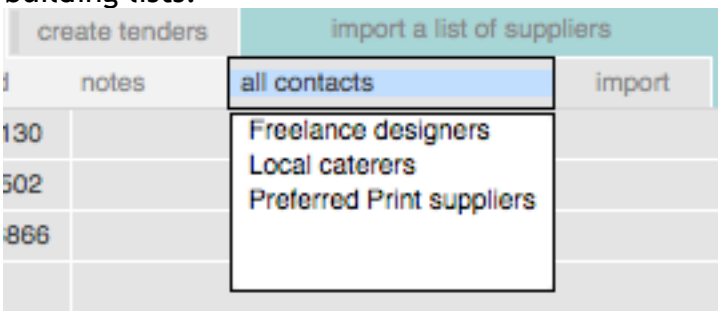
To add more than one supplier, click into the next free space under the “supplier” header and repeat the above procedure. Once you have selected all the suppliers you wish to obtain quotes from, the window should look something like this.



The “notes” field on each line will display the first line of text entered into the notes field of the company records (if entered). This can be useful if you have used the notes field to record facts or information about the products or services (or quality!) of that company.

Importing a list of suppliers

If you have created lists in your people records of suppliers, you could also import a list of suppliers into this window. For example, you might want to make a list of your “top” printers, or ones that specialize in certain print jobs. Refer to the section on “lists” in the Companies part of this manual for details about building lists.

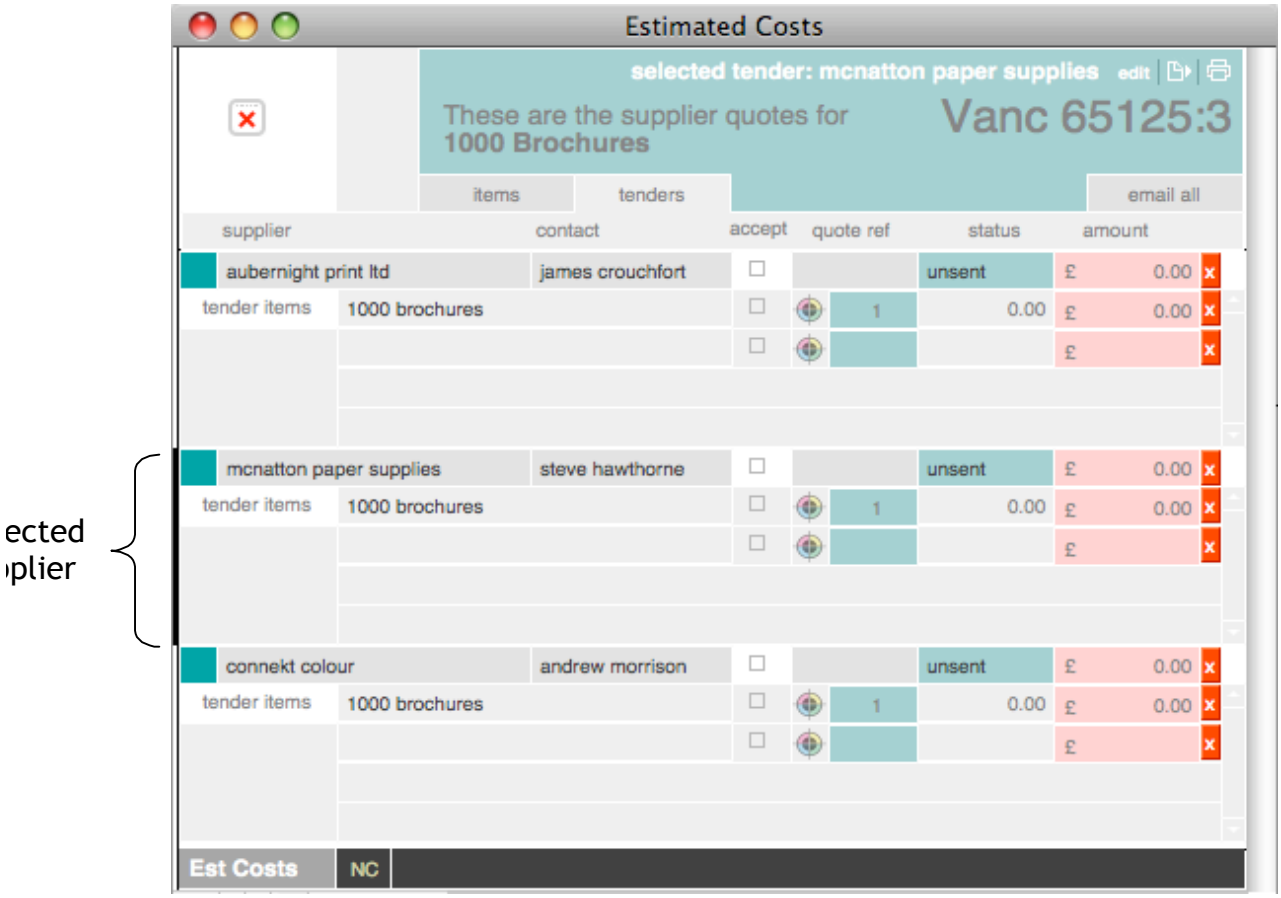


If you do have a suitable list of suppliers, select it here and click “import” to bring in the selected names

Now that the suppliers have been chosen, click on the next tab along at the top of the costs window, which is called “create tenders”.

Sending out tenders

Once you have clicked the tab “create tenders” you will be able to send your tender document to all the suppliers you have selected. The screen from which tenders are sent out will look like this:



Sending the tender

From this screen the created tender can be sent out as an email, or printed as a document. At the top right hand corner of this window are the three icons for edit, email and print.

1. Click “edit” to view the tender document. There will be a different, personalised document for each supplier, and you can view and edit them each in turn. To select the different supplier tenders, select the required one by clicking their name on the left hand side of the screen. The black border edge will show you which one is currently selected. Once you have edited and previewed the tender document you will be asked if you would like to print or email it, which you can do directly from edit/preview mode.

2. Click the email icon to go straight to emailing the tender document for the currently selected supplier. You will be presented with the familiar contact window, from which you can amend the email record before actually sending the email. The tender document will be attached to this as a PDF, and it will already be formatted to the recipient, but you can add a personalised message in the email body if you wish.

3. The PDF document created will be saved in Traffic and can be viewed on the main project summary screen at any time.

4. Click the print icon to print the tender document for the currently selected supplier. This will also be saved as a PDF in Traffic, for you to view on the project summary screen.

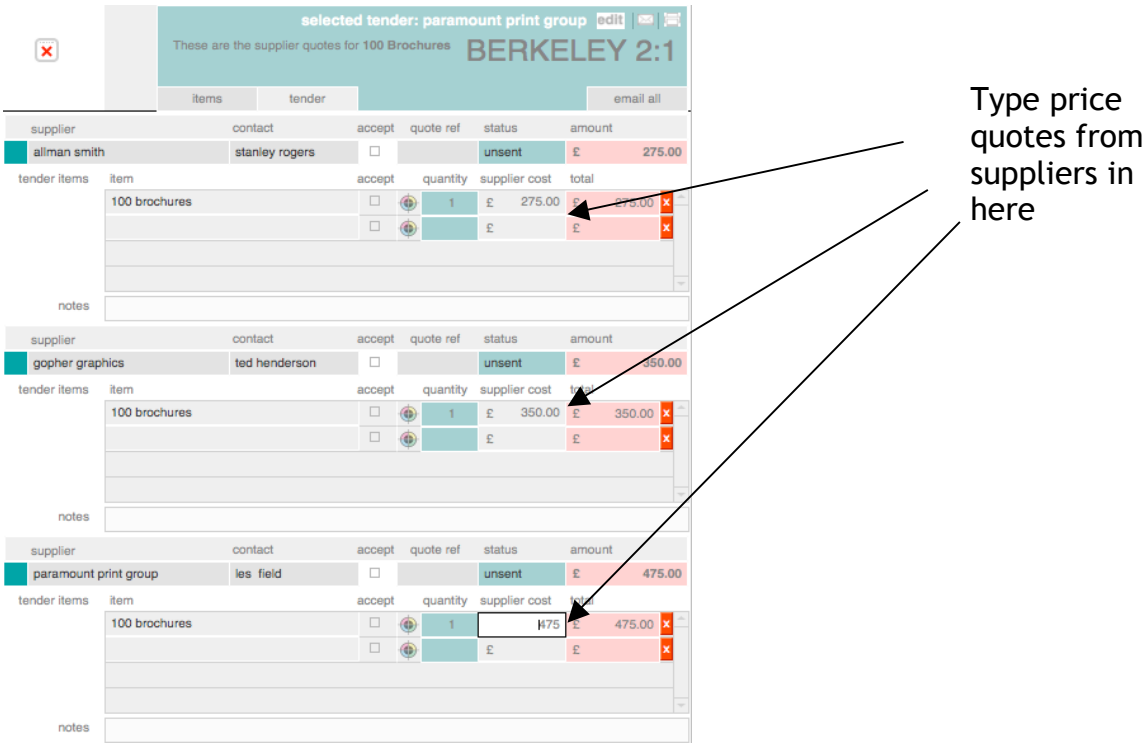
The tender window also has an option called “email all”. Click here to send the tender by email to all suppliers at once. If you use this function you will not be able to add any text into the email body, but a PDF will still be saved of each tender, and a contact record will also be created and saved for each one. If your standard Tender document template is good enough for most occasions, you may find you just need to preview one copy and then you can click “email all”. Remember that the PDF will automatically personalize the details to each supplier. The email that gets sent will automatically include a greeting to the supplier. Although you cannot change this on the fly, you can decide on the content of this greeting in the templates area under the Administrator tab in Traffic (it is found under the heading of “Tender Email” in your letter templates).

Note: Suppliers will not be “cc-d” or otherwise aware of who else has been sent the request.

Recording supplier replies to tenders.

Once your suppliers have responded you will need to return to the tender window and input the details of the quotes you have received.

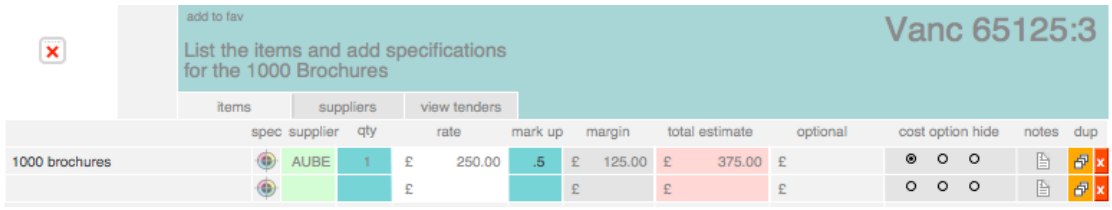
To do this, open up the estimated costs window again and go to the “tenders” tab. You can type in the amount quoted by each supplier into the fields on the right of this screen, underneath the email status window in the field headed “supplier cost”:



Once all the quotes have been entered you can decide which one to accept. To mark the one you wish to use, click the box under the column headed “accept” to leave an “X“ against the chosen supplier quote.

The accept mark can be left on multiple line items, or you can click the box with the white background to select all tenders from the same supplier. The status window will now display the message that the tender is “accepted”. If you do not tick the white box, the status will be marked as “part accepted” (you may be selecting different quotes from more than one supplier if the tender had more than one line item in it).

The chosen quote will now be displayed in the main estimated costs window, along with your default mark up, and the chosen supplier will also be marked under the column headed “supplier”.



Setting a supplier without tendering

Using the tender option for 3rd party costs in Traffic is optional, but you could also set a supplier without tendering at all, if you know how much they are going to charge you. This would simply involve choosing the supplier name in the supplier area (as above), entering the cost they provide this service for in the tender area (as above), then immediately marking the cost as "accepted". An advantage of filling in and accepting a quote like this is that if you set the supplier at this stage, those details will be carried through to the purchase order, which will be raised later on – perhaps by a different staff member who needs to know the supplier you have chosen.

The third option available to you is the ability to set up more than one option and line item for a 3rd party cost, which we will look at next.

Making costs with multiple items

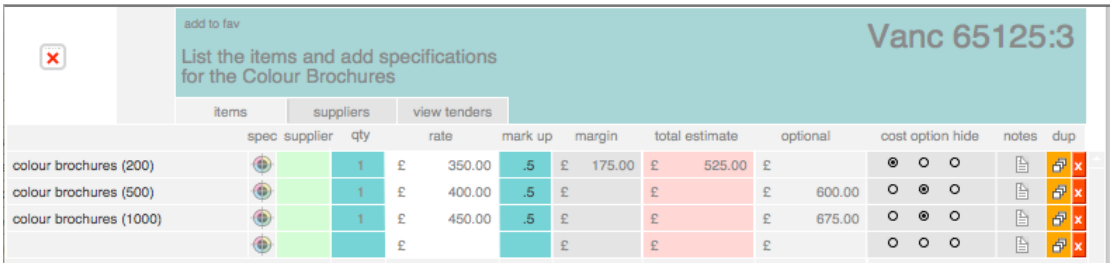
You can use the estimated costs window to provide a variety of different options to your client. The following section will show how to do this, using a print cost with different quantities as options.

Let us say that you are ordering some printed brochures, and have been asked to estimate the price for 200, but you wish to also offer optional prices for 500 and 1000 quantities of the same item.

You will need to enter a main cost line for the brochures under the 3rd party costs tab as before, and then open the estimated costs window to display the cost line item details. You can add more line items to this screen, and make them all slight variations of the original. To make new lines under the first cost item, simply click into the free lines underneath and add your second and third options. You can then give them each a cost price and detailed spec.

Setting Some Costs As Options

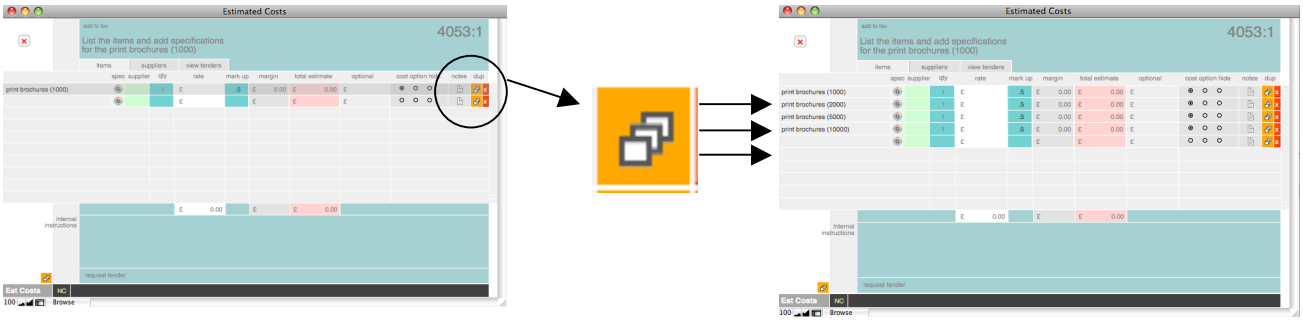
At the far right of each line you will see the settings for "cost", "option" and "hide". These work in the same way as on the fees estimate screen. Simply click the radio buttons to mark certain line items as options or costs. In our example, the 200 quantity is the suggested cost, but we are also offering options of 500 and 1000 copies.


add to fav
List the items and add specifications for the Colour Brochures
Vanc 65125:3
items
suppliers
view tenders
spec supplier qty rate mark up margin total estimate optional cost option hide notes dup
colour brochures (200) 1 £ 350.00 .5 £ 175.00 £ 525.00 £
colour brochures (500) 1 £ 400.00 .5 £ £ £ 600.00
colour brochures (1000) 1 £ 450.00 .5 £ £ £ 675.00

To make the process easier, you can also duplicate line items.

Duplicating lines

Rather than writing three individual cost items, you can create a detailed spec for the first line item in the estimated costs window, and then use the "duplicate" button at the far right of that row to make an exact copy underneath. The duplicate button will copy the line item with its title and any specs you have added.



By doing this you can make slight alterations to the lines and show them on your estimate as variations or options of the basic cost estimate.

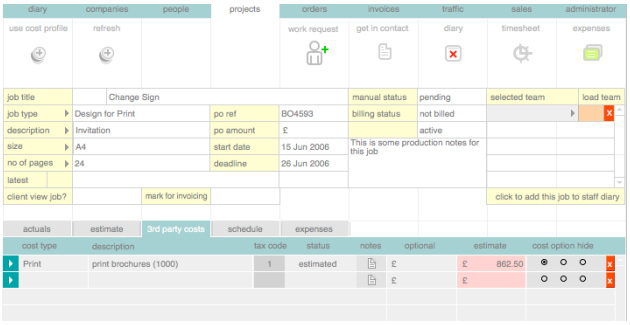
Be sure to change the line item description of duplicated lines too, as this will be copied exactly from the first line as well as the spec.

Before you preview your estimate document with 3rd party costs added, you need to check how you want the costs to appear.

What will show on your estimate?

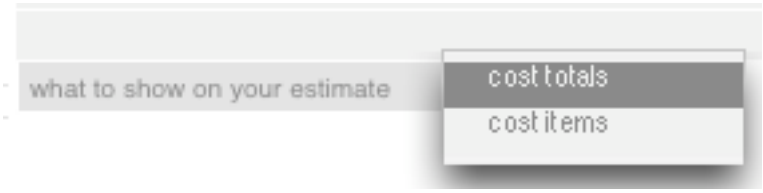
There is an important setting that governs how 3rd party costs appear on your estimate document. You need to decide if you wish to show either the cost total, which is the main heading that appears under the 3rd party costs tab, or the cost items, which are the lines that appear within the estimated costs window.

This is the Cost TOTAL



These are the Cost ITEMS

The setting can be changed at the bottom left of the main job screen, when the 3rd party costs tab is on display:

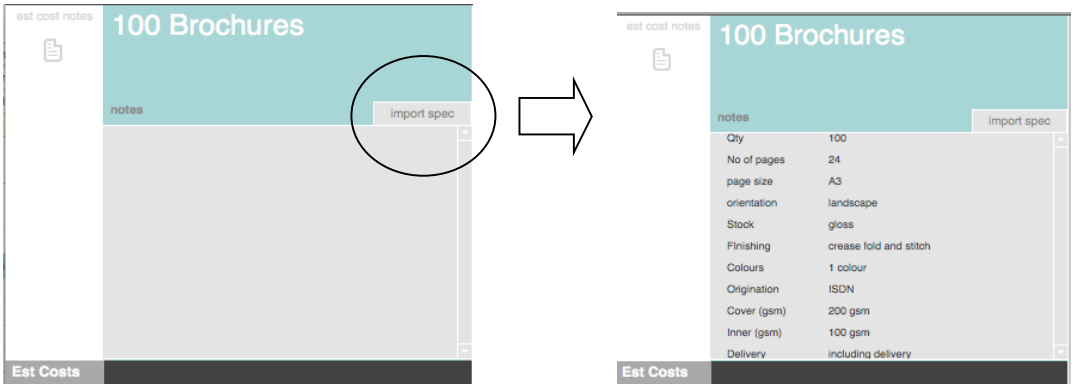


You can choose to show Cost Totals or Cost Items.
The difference will be come clear if you are making multiple options within one overall 3rd party cost.

To show the multiple line items/options on the estimate, you must set it to “cost items”.

3rd party cost notes fields
The choice you make here will also apply to any notes fields that have text in them - make sure you add notes to the correct place (on total line or on item lines), depending on which setting you have chosen.

One advantage of displaying cost items is that the cost items notes field can be used to display the spec you have entered on your customer estimate. If you go into the Estimated Costs window and click the notepad icon on the far right any cost line item, the small notes window will open up.
Notice the box labelled “import spec” at the top right corner of the window. Clicking this will import the spec you created for the supplier into the notes area.



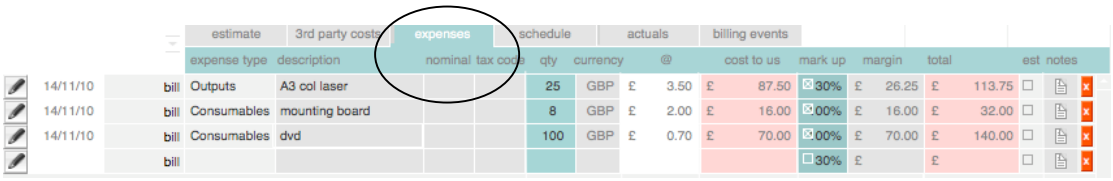
You can now tidy this up or edit it for your client if you wish, as this will appear on your client estimate.

The “import spec” function is not available for the notes field that appears on the cost totals line. Notes added to the cost totals line have to be typed in manually, plus they will only appear on your estimate if you set the option described above to “show cost totals”, plus they can also be seen when the estimated cost is turned into a purchase order later on AND on your client invoice, so use this notes field carefully.

EXPENSES

Traffic allows you to log expenses against a job. These can be recorded purely for judging what your costs are, and they can also be marked up and included in the invoice to your client. You can decide whether to charge for expense items or not when you review the items in the job for invoicing.

There are two ways to record expenses. You can add them in the main project area, in a similar way to 3rd party costs. They can also be added once the job is underway, from a separate icon that is displayed at the top of most main Traffic screens, just below the main dashboard. In this section we will deal with adding expenses directly to a job at the estimating stage, by using the "Expenses" tab on the main job estimate screen.



Adding ad-hoc expenses once a job is underway will be explained in the section on Timesheets, later in this manual.

Expenses or 3rd Party Costs?

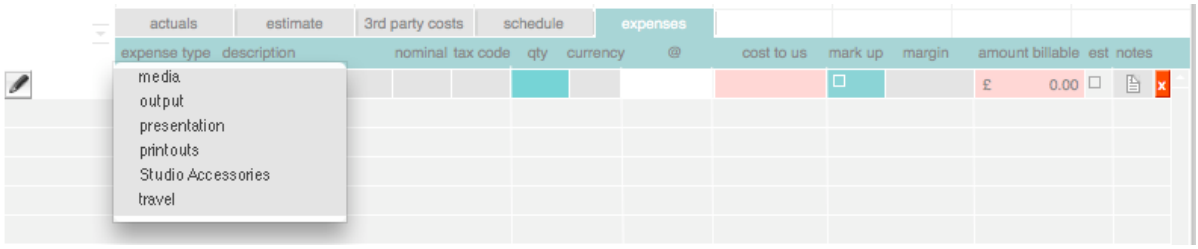
If you are not sure whether an added cost should come under the 3rd party costs tab or the expenses tab, the simple answer is that ***3rd party costs require the creation of a Purchase Order and expenses do not***.
A cost has to be ordered especially for the job from a supplier, who would typically require a purchase order – and send you an invoice. An expense is something you do not use Traffic to manage the purchase of, but wish to record the cost of using the item, for example, studio supplies & materials, or travel and hospitality costs.

How to define your expenses

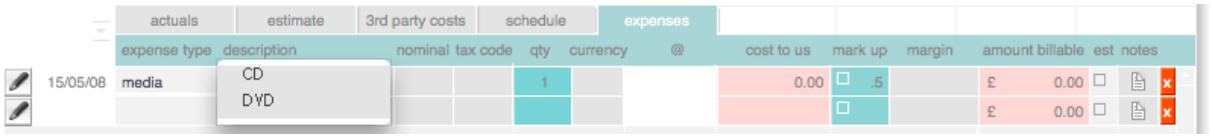
When you log expenses, for the most part you will select them from a pre-set list. The list of expense types is created & modified by Traffic users themselves in the Administrator area. For more details, refer the section on "expenses" in the Administrator chapter, also later on in this manual.

How to log expenses in the main job screen

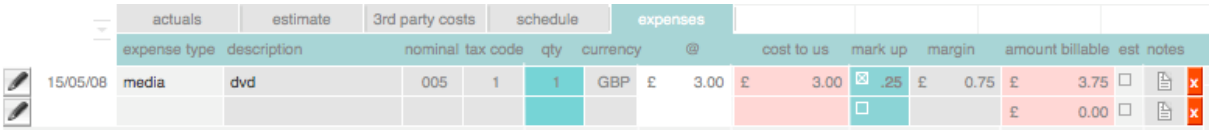
On the main job screen, click on the tab marked “expenses” on the lower half of the screen to begin adding expenses. You will be shown a series of fields that need to be filled in to record each expense line item. Begin with the first free line and click on the field on the left to select the expense type from the drop down menu under the header “expense type”.



For this example, we will select “media”. Once you have selected your expense type, use the drop down options under the header “description” to select the correct item of that type. In our example you can see that the “media” expense type consists of CD and DVD options.

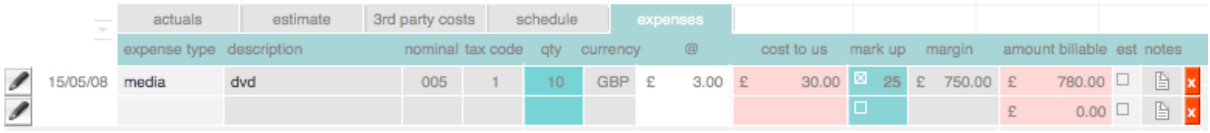


Once you have selected the expense item, the details corresponding to that item will be displayed on the line in full.



In our example, you can see that DVD media comes up with a cost per unit of £3 and a mark up of 20%. Other details that might be pre-populated on the line are a nominal code, tax code and a currency. These are usually filled out in the administrator section, but if not all details are present, you can complete the missing fields yourself, if you know them. At a minimum, you MUST ensure the currency and unit cost per item is filled in. The margin can also be set here, or amended (by over-typing) if you wish.

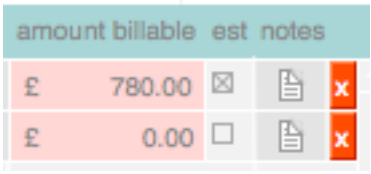
For all settings, you should then add a number into the “qty” column to record the amount/quantity of the expense item being logged. The system will automatically multiply the cost per unit by this amount and add the mark-up, to give you a figure in the “amount billable” window.



Adding expenses to your estimate

If you wish, you can also mark expense lines on this screen so that they will appear on your Estimate. Using this function, you can show certain expenses to a client prior to the job being accepted.

To mark an expense to appear on the estimate, check the box under the column headed “est” at the far right of the estimate item line. This function has no bearing on whether you can bill for the items or not, it merely makes it appear on the Estimate layout.



Adding custom expenses

If you need to add a one-off expense that isn’t set up to appear in the drop down menu, you can make the line item editable by clicking the “pencil” icon that appear on the far left of the item line, which will allow you to over-write what is available from the drop down fields.

Making expenses non-billable

If you need to add an expense that isn’t intended to be billed to the client, you can use the setting to the left of the line where you will see an option that can be set (by clicking on it) as either “bill” or “non-billable”.
Line items set to “bill” will come up at invoicing in the normal way to be included on the invoice.
Line items set to “non-billable” will NOT be included on the invoice.

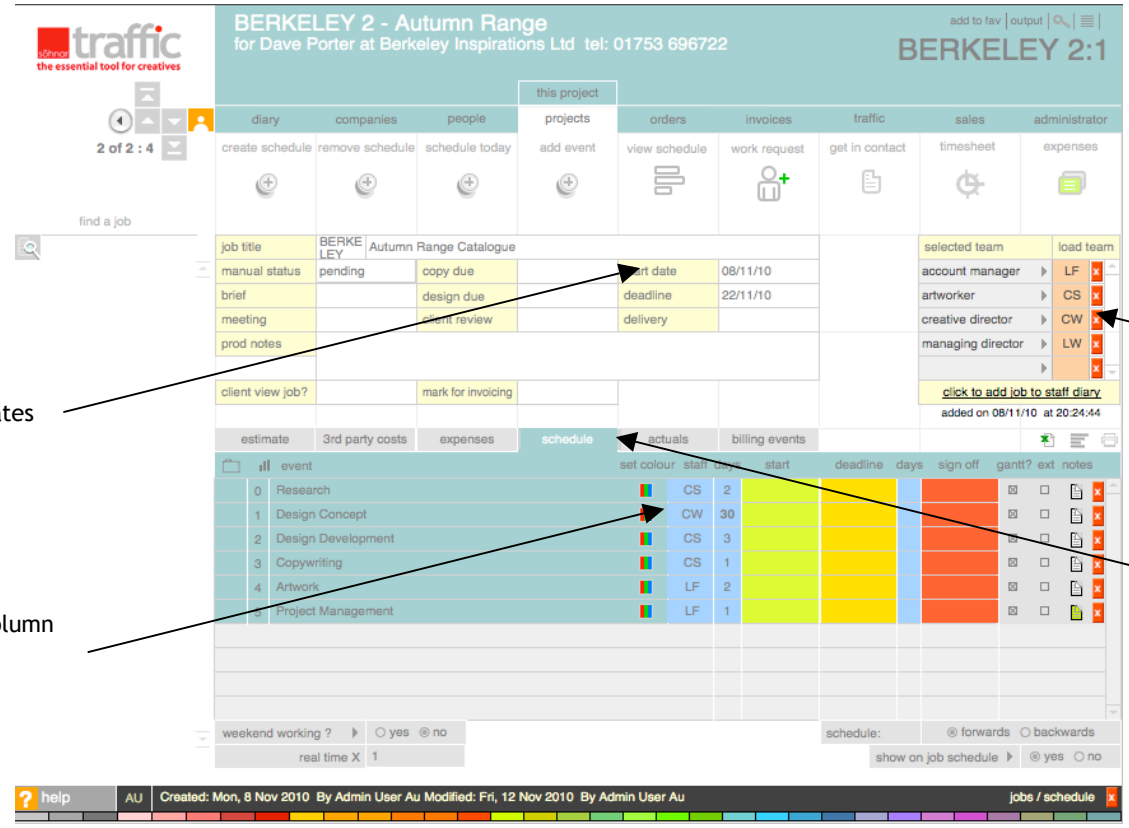
It can be useful to pre-set certain expenses as non-billable, but do remember that there is another opportunity to make this decision at the point of raising the invoice, so if you are not sure yet, you may wish to make this decision at the invoicing stage.

One advantage of setting it here is in cases where the person raising the invoice is not the same person who added the expense.

SCHEDULING

Once you have created the stages and tasks of your estimate, you can plan a timeline for the entire job from start to finish, and add a team of staff members to the job, as well as assigning people to individual stages or tasks.
The procedure is managed on the main Job estimate screen, under the tab called “schedule”.

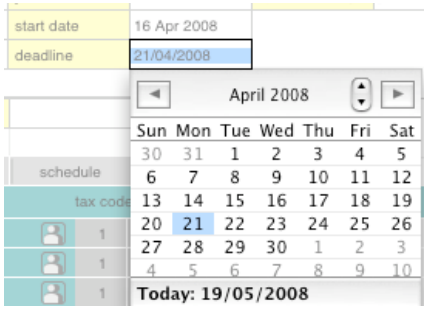
Areas of Job Screen involved in scheduling



Even if you do not plan to create a full schedule for your job, it is recommended that you set a job START and DEADLINE date.

Setting a start and deadline date

The start and deadline dates for the job can be typed into the appropriate fields at the top of the main job screen. You can access this in both the estimate view and the schedule view of the job screen.



If both fields are empty, simply type the required dates into the fields, or select from the drop down calendar that appears.

You may notice when you come to fill these dates in that these windows are not empty:

Is the start date is already filled in? Traffic enters the current day's date as a default start date when you create a job (you can over-ride this).

Is the deadline date is already filled in? If you import a job profile that contains hours, Traffic will use these to estimate the minimum time needed to complete those hours, with a minimum of one day per stage (you can over-ride this).

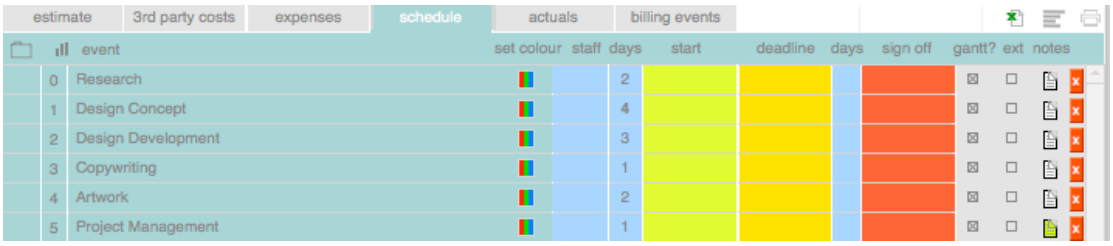
What order to plan your schedule in?

Depending on how you like to work, you can either add staff names to each stage or task within the whole job & then create your timeline, or you can create your detailed schedule before selecting team members. It may be that you wish to get client approval on the entire timeline before you decide who will do the work. Or, you may wish to add the staff names to the stages and plan the schedule around them. Traffic is flexible and allows you to work either way. You could also create the schedule before you even select your team.

For the purposes of this example, we will prepare the entire schedule before choosing a team and adding staff names from our team to the individual stages and tasks. In practice, you might be working in a different order to this.

The Schedule tab

This tab is between the 3rd Party costs and Expenses tab on the lower half of the main job screen. Click on this tab to display the scheduling area:



The schedule area displays three distinctly coloured areas. There is a yellow column for stage start dates, an orange one for stage deadline dates, and a red one for sign off dates. Before and after the start and deadline date columns are two columns headed “days”. These columns can be used for creating automatic schedules. This screen allows you to plan a full timeline with start and deadline dates for every stage of the job.

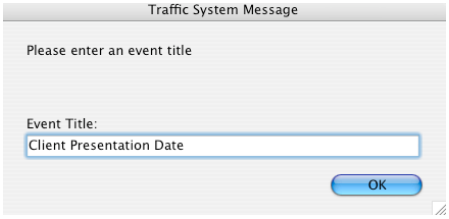
Before creating a schedule, you might want to add some non-chargeable stages to your schedule. These special stages are called “events”.

Adding Events

Events are non-billable stages of a job, such as important milestone dates or dates of client actions that need to be marked on your calendar. They can be created in the schedule area, without the need to include them as part of the main estimate.

To add an event, click on the “add event” plus button at the top of the screen, under the main tabs. You must have the “schedule” tab displayed to be able to add events.

A pop up box will ask you to name the event:



Once the event has been named it will appear in your list of stages, but it will only be visible under the Schedule tab view. An event may be client facing or just for internal planning – you can select later if the client will be able to see the event or not.

The event will now be added to the schedule.

As you can see from the illustration, an event normally takes on a different default colour from normal stages, and it is also inserted at a default position at the start of the schedule.

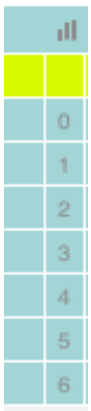
The colours of stages (and events) can be changed, but first we will look at choosing the dates.

After adding one or more events, you may now wish to change the running order of the stages.

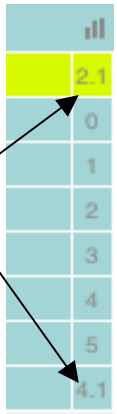
Changing the order of stages

Each stage has a field on the far left of the line that can contain a numerical value. This is used to sort the stages into a preferred order. To change the order, simply re-number the stages so that they are in the correct sequence. Once you have done so, click the small “graph”-style icon at the top of the number column to re-order the rows.

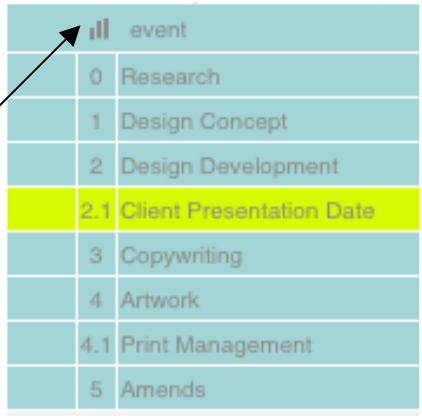
1. Unsorted stages



2. Re-number



3. Click sort button to put stages into order



This numbering sequence is very flexible. Note how in our example we numbered the stages with decimal points. So to insert a stage between 2 and 3, we called it “2.1”

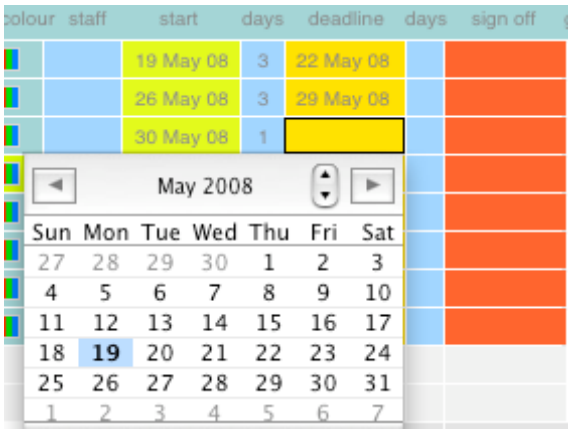
You can of course re-number the whole list with whole numbers. You do not have to include “0”, but if you do, it will fall before “1”. You can also include negative values, such as “-1” and “-2”, which will add stages before the “0”. If any stages are deleted, the remaining numbers will remain in sequence even if there are gaps.

Please note that tasks can only be re-ordered underneath the stage that they belong to, and that events cannot be inserted between tasks.

Once your stages and events are in the correct sequential order, you can create a schedule, and this can be done either manually or automatically.

Adding schedule dates manually

To add your own dates manually, simply click into each window of the schedule and select the dates required from the pop-up calendar. Continue adding dates until the entire schedule is filled. You do not have to work around the figures in the “days” columns, but these numbers are generated by Traffic based on the number of hours in your estimate, so they can be useful as a guide.



Add dates to the “sign-off” column if you wish to add any of these to your timetable.

The sign dates can be used to suggest when sign off is expected from the stage it is set afterwards, or simply to put “breathing space” into the schedule between stages.

Creating a schedule manually can be time consuming, so it is often quicker to create the schedule automatically.

Creating schedules automatically

Traffic can fill in all the dates of a schedule for you automatically, working on the number of production days you would like to allot for each stage. It will also calculate how many production days are required, by counting the number of hours that you built into your estimate.

Rules of automatic schedule creating

An automatically created schedule will make every stage run consecutively after the one preceding it. The process does not manage the running of any stages concurrently, but you can make adjustments to any of the dates after you have made it.
Events in a schedule will be treated the same way as stages.

Tasks in a schedule

If you have stages that consist of tasks, these will be given the same start date as the stage that they come under. This is because the order of tasks within a stage might be different for every job, so although Traffic will give all tasks a suggested start and deadline date, you will probably need to manually over-ride the dates of some tasks yourself. This can be done very simply after running the automatic creation of the schedule.
You must make sure that any tasks are displayed (folder icon is clicked to "open" position) before creating a automatic schedule, otherwise the system will be unable to generate dates for them correctly. Tasks can be hidden again from the schedule once the dates are created.

Deciding on the duration of each stage

The schedule area is divided into three coloured blocks. Beside these blocks (on the left) is a column called "days" into which you can assign the number of production days between the start and deadline dates.

You may find that as soon as you click on the "schedule" tab that there are already figures in the "days" column. These figures are drawn from the number of estimated work hours given to the stages in the estimate. Traffic will provisionally assign a day for every 8 hours of work on the estimate, for example, estimates of 1, 2 or 5 hours of work would fall within one day, whereas 12 or 14 hours would fall within two days.
These figures are designed to be a guide, so overtype the numbers in this column if you wish to change them.

Note: If your working day is not 8 hours, you can change this in the Administrator area, so that when Traffic calculates the length of a working day, it uses the correct details.

Please note that you cannot schedule stages for less than one working day. This process will eventually produce a chart of dates, therefore even a stage with a very short estimated time has to appear as one date on your schedule. You can of course make several stages appear on the same day by giving them all the same date.

The “days’ column on the right of the deadline dates allows you to build approval or sign off days into the schedule. These are days after the end of one stage and before the beginning of the next. Traffic does not suggest sign off days, so if you don’t fill this column in, the automatic schedule will begin every stage directly after the end of the one preceding it.

Traffic will use these figures to select the start and deadline dates of all stages in the schedule, so it is up to you to amend these as required. In the example below, we have increased the number of production days and added a sign-off period of 2 days between every stage.

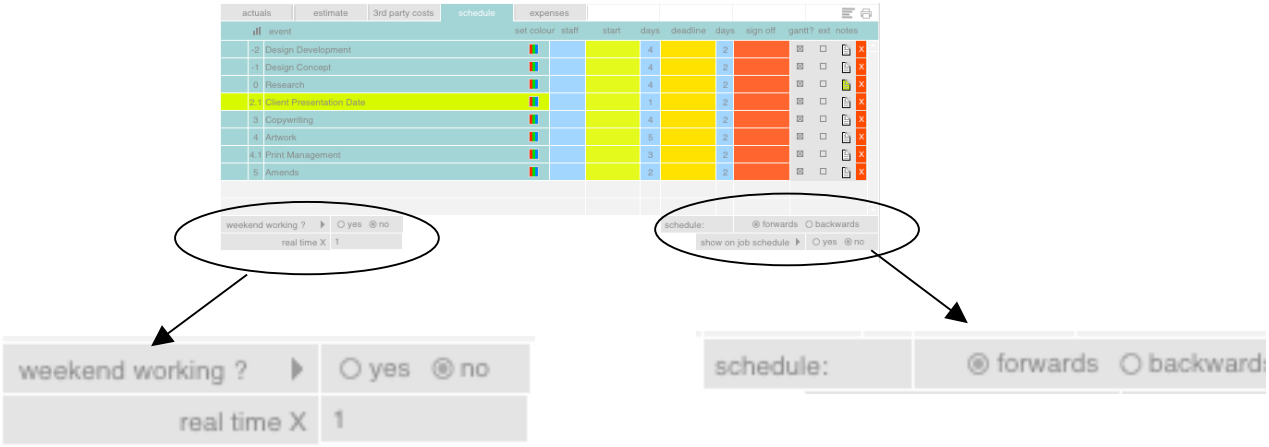
Note: Changing the amount of production days for the schedule will NOT affect the hours or cost of your estimate.

You are now ready to create the schedule.

Schedule settings

The way that Traffic calculates the schedule is flexible. There are options at the bottom of the schedule screen that allow you to choose how the schedule is created.

You can decide to either run it forwards from the job start date, or backwards from the deadline date. To make your choice, use the radio buttons at the bottom right of the schedule screen which are marked “forwards” or “backwards”.

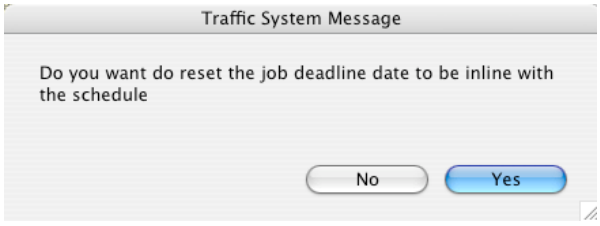


You can also specify whether weekend days get counted as production days, by clicking “yes” or “no’ to the “weekend working” option on the left. You can increase the duration of the schedule by adding a multiplier to the “real time” (number of days) value that Traffic is working with. For example, putting “real time x 2” would translate every 2 days you enter into 4 days on the schedule, and so on.

Once you have set these parameters, you can run the automatic schedule. To run it, click the “create schedule” plus button at the top left of the main job screen.

Traffic will now calculate start and deadline dates for all the stages based on the amount of days you have specified for production time, and any sign off dates (if used).

This may take a few seconds, as the system processes the request. Once it is finished, a dialogue box will appear asking you the following question:

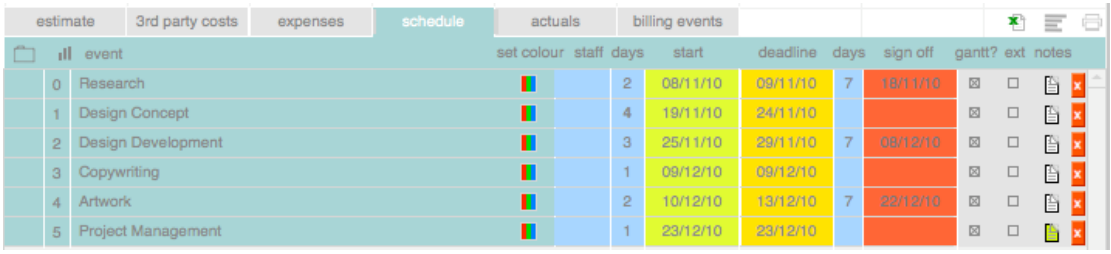


You must now confirm whether the overall job deadline date (which you may have set earlier) should match the date generated by the automated procedure.

If you click “yes” to this message, your overall job deadline date will be changed in the system to be the same as the last deadline date in the schedule (this date may be a sign off date if you have used that column). If you have not yet entered any job deadline date, Traffic will insert the calculated deadline date into that field.

If you click “no” at this point, the schedule will still be created, but the job deadline date will not be updated to reflect it. If you have not entered any job deadline date, that field will remain blank.

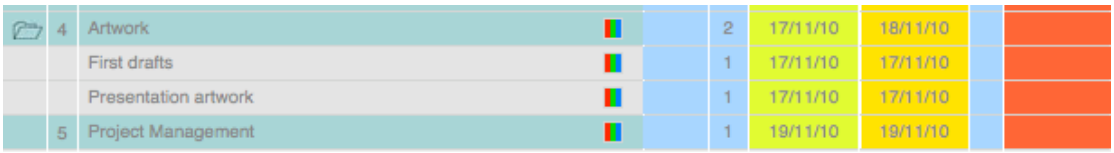
Once you have made your decision, all the dates will be inserted into the corresponding fields and the schedule will be complete. Here is an example of a completed schedule, which has been checked to run forward.



Adjusting the schedule

You are now free to make any adjustments to the dates calculated. Simply click onto any date and use the pop up calendar to alter dates as required. Use this method to make any stages concurrent, or overlap.

If any stage has tasks within it, you might wish to adjust the scheduling of the tasks. Here is an example of a schedule created automatically for a stage with tasks:



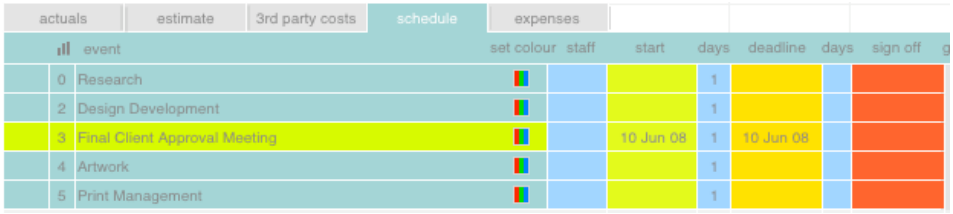
Notice that all the tasks for the Artwork stage start at the same time as the stage they are part of.

Notice also, that the next stage (Project Management) begins after the deadline date of the Artwork stage (24th June), and not after the last task (20th of June). The start date of a stage depends on the deadline date of the stage before it, not the tasks within that stage.

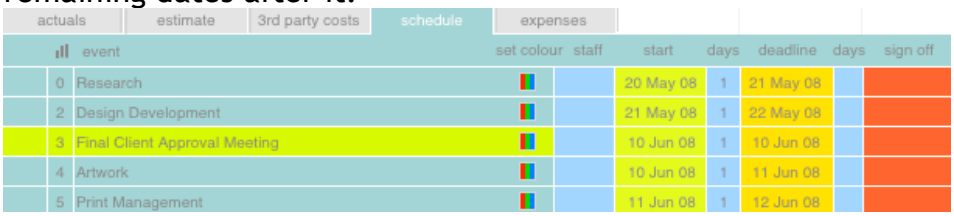
Please note again that EVENTS cannot be inserted between tasks.

Pre-setting dates

The automatic schedule can also be made to work around any immoveable dates. In the example below, we have entered a "Client Meeting" as an event, which we know is planned to fall on the 10th of June. This date has been manually entered onto the schedule BEFORE running the automatic procedure.



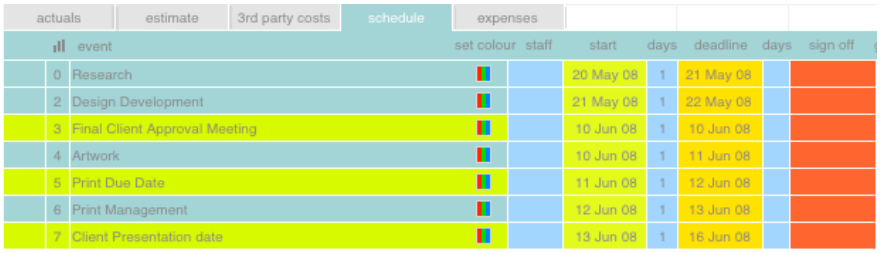
if you manually set dates in a schedule you will notice the colour changes to blue. This denotes that these dates have been locked down. Once this date is set, the "create schedule" button can be pressed and the schedule created. You can see that the schedule works from the start date as normal but keeps the meeting date for the 10th of June, and then plans all remaining dates after it.



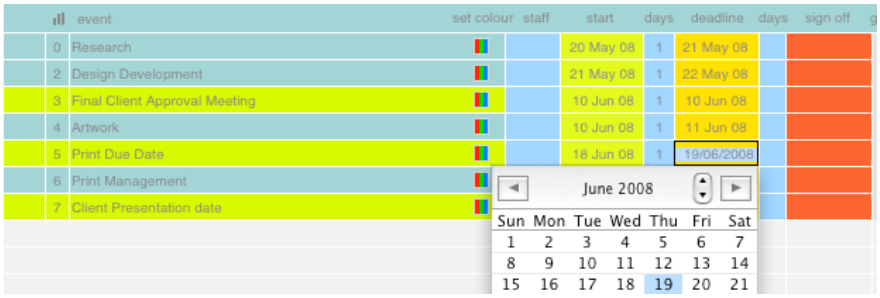
Adjusting the schedule to accommodate altered dates

In the same way, you can run an entire schedule, then come back later to move a single date (for example, to put back a print stage because the work preceding it ran late), and re-run the schedule to obtain a new overall deadline.

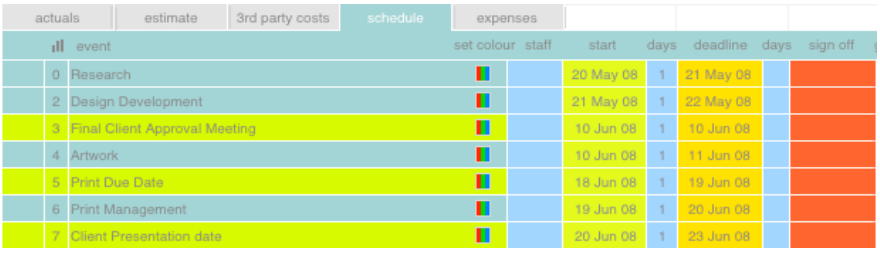
In our example below, the print date needs to be put back a week due to the artwork stage being late.


actuals
estimate
3rd party costs
schedule
expenses
event
set colour
staff
start
days
deadline
days
sign off
0 Research 20 May 08 1 21 May 08
2 Design Development 21 May 08 1 22 May 08
3 Final Client Approval Meeting 10 Jun 08 1 10 Jun 08
4 Artwork 10 Jun 08 1 11 Jun 08
5 Print Due Date 11 Jun 08 1 12 Jun 08
6 Print Management 12 Jun 08 1 13 Jun 08
7 Client Presentation date 13 Jun 08 1 16 Jun 08

Using the calendar windows in the date fields for the Print Due date event, we can move it forwards by 7 days from the 12th to the 19th of June.


event
set colour
staff
start
days
deadline
days
sign off
0 Research 20 May 08 1 21 May 08
2 Design Development 21 May 08 1 22 May 08
3 Final Client Approval Meeting 10 Jun 08 1 10 Jun 08
4 Artwork 10 Jun 08 1 11 Jun 08
5 Print Due Date 18 Jun 08 1 19/06/2008
6 Print Management
7 Client Presentation date
June 2008
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21

Then if we click the “Create Schedule” plus button again, a new schedule is created, and all dates following the amended one also move back one week.


actuals
estimate
3rd party costs
schedule
expenses
event
set colour
staff
start
days
deadline
days
sign off
0 Research 20 May 08 1 21 May 08
2 Design Development 21 May 08 1 22 May 08
3 Final Client Approval Meeting 10 Jun 08 1 10 Jun 08
4 Artwork 10 Jun 08 1 11 Jun 08
5 Print Due Date 18 Jun 08 1 19 Jun 08
6 Print Management 19 Jun 08 1 20 Jun 08
7 Client Presentation date 20 Jun 08 1 23 Jun 08

By typing in important dates manually before you click “create schedule”, you can manage dependencies and immoveable dates on your schedule quickly and efficiently.

Note: Please note that tasks cannot be anchored.

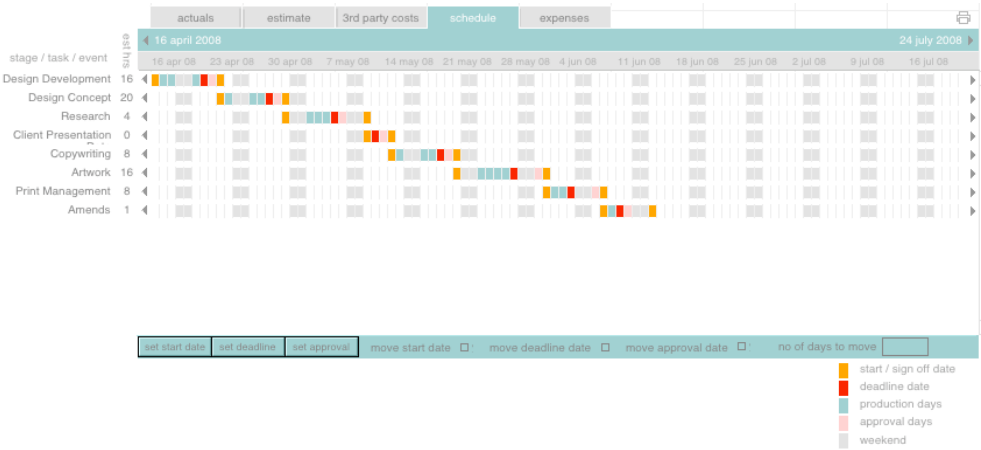
In addition to this schedule, Traffic can also turn these dates into a Gantt chart.

Showing schedules as a Gantt chart

Traffic has a built-in Gantt chart feature that automatically translates a schedule of dates into a chart view. To see the Gantt chart of your schedule, simply click the Gantt icon to the far right of the schedule screen.

Gantt View
actuals
estimate
3rd party costs
schedule
expenses
event
set colour
staff
start
days
deadline
days
sign off
gantt?
ext
notes
-2 Design Development 16 Apr 08 4 22 Apr 08 2 24 Apr 08
-1 Design Concept 24 Apr 08 4 30 Apr 08 2 02 May 08
0 Research 02 May 08 4 08 May 08 2 12 May 08
2.1 Client Presentation Date 12 May 08 1 13 May 08 2 15 May 08
3 Copywriting 15 May 08 4 21 May 08 2 23 May 08
4 Artwork 23 May 08 5 30 May 08 2 03 Jun 08
4.1 Print Management 03 Jun 08 3 06 Jun 08 2 10 Jun 08
5 Amends 10 Jun 08 2 12 Jun 08 2 16 Jun 08

The screen will change to a Gantt view of the dates on the schedule:



The start dates, production dates, deadline dates and approval dates are all colour coded. A key appears in the lower right corner of the screen.
From this view you can also make changes to the dates. At the bottom of the screen are functions that allow you to move the dates in the schedule.

Set Dates

Use these three buttons to set new start, deadline or approval dates on the Gantt chart. First click on the day that you wish to move a date to and the cursor will highlight the border of that day:

Then click the appropriate button (in our case an approval date). Traffic will re-position the approval date for that stage onto the selected day.

All the intermediate production days will be filled in for you.

Move dates

Use this function if you wish to pick the amount of days a stage needs to be moved instead of picking the calendar date.

First add a figure into the “number of days to move” window.

Then check the box for the parts of the schedule you wish to move by this amount (may be all three boxes or just one).

Finally, go to the side of the chart where you will see small dark grey arrows. They appear at the far left, and at the far right of every stage line.

Click the left side arrow to move the dates back in time by the set amount of days, or click the right side arrows to move the chosen dates forward in time.

Dates moved on the Gantt view will update the table of dates in the normal schedule view, but weekends will not be worked around, and dependencies will not move when this method is used.

Once you are happy with your dates, you can prepare the Gantt chart for printing or emailing. You can choose to remove certain stages from the printed version of the Gantt chart. This can be done on the normal schedule screen.

Hiding dates from the Gantt chart

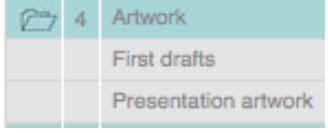
If you wish to send the Gantt chart to your client, but have some stages or events which are for internal information only, these can be hidden on the printed version. On the normal schedule view, simply un-check the box under the heard “Gantt?” which appears at the far right of every stage line.

actuals
estimate
3rd party costs
schedule
expenses
event
set colour
staff
start
days
deadline
days
sign off
gantt?
notes
-2 Design Development 16 Apr 08 4 22 Apr 08 2
-1 Design Concept 24 Apr 08 4 30 Apr 08 2
0 Research 02 May 08 4 08 May 08 2
2.1 Client Presentation Date 17 May 08 1 18 May 08 2
3 Copywriting 20 May 08 4 26 May 08 2
4 Artwork 28 May 08 5 04 Jun 08 2
4.1 Print Management 08 Jun 08 3 11 Jun 08 2
5 Amends 15 Jun 08 2 17 Jun 08 2
gantt?

Any stage with this box unchecked will NOT appear on the printed version of the Gantt chart. They will still appear on the Traffic version of the Gantt chart.

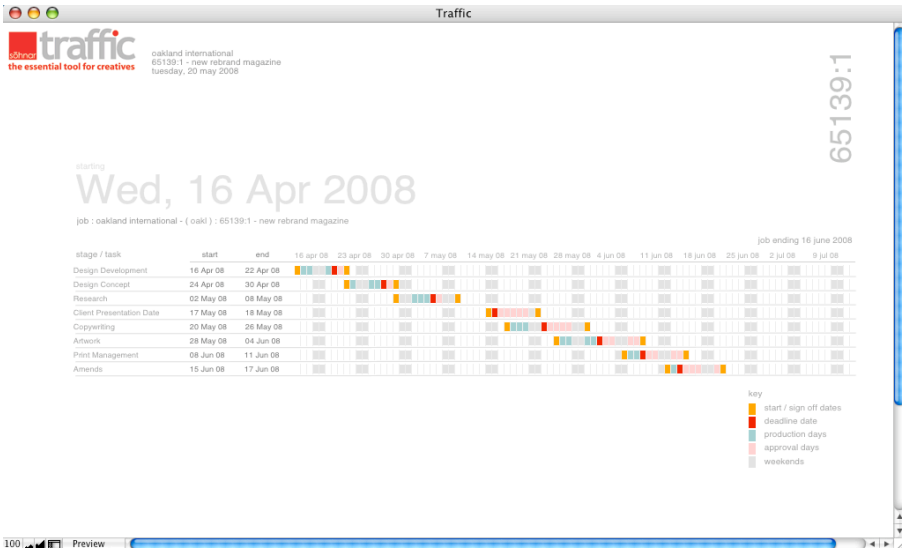
Tasks on a Gantt Chart

It is up to you whether tasks get displayed on the Gantt chart. In the same way as you decide whether they will show on your estimate, use the “folder open” and “folder closed” icons on any stage to hide or display tasks.



When tasks are hidden like this, they will not be seen on the Gantt chart.

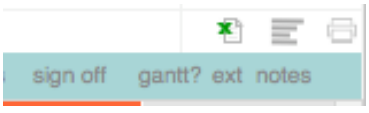
To see the printed version of the Gantt, use the printer icon on the far right of the schedule screen (either in normal schedule view or Gantt view), and simply follow the instructions on the screen. Your Gantt chart can now be previewed, printed or emailed out of Traffic.


Traffic
traffic
the essential tool for creatives
oakland international
65139:1 - new rebrand magazine
tuesday, 20 may 2008
65139:1
starting
Wed, 16 Apr 2008
job : oakland international - (oakl) : 65139:1 - new rebrand magazine
job ending 16 june 2008
stage / task
start
end
Design Development 16 Apr 08 22 Apr 08
Design Concept 24 Apr 08 30 Apr 08
Research 02 May 08 08 May 08
Client Presentation Date 17 May 08 18 May 08
Copywriting 20 May 08 26 May 08
Artwork 28 May 08 04 Jun 08
Print Management 08 Jun 08 11 Jun 08
Amends 15 Jun 08 17 Jun 08
key
start / sign off dates
deadline date
production days
approval days
weekends
Preview

As with other Traffic documents, a PDF will be saved of the chart when you print or email a copy of it. Each time you change the schedule, you can print or email a new copy of this chart, and all revised versions will also be saved in the system, time and date stamped in the same way as estimates and other PDFs.

Excel Export of schedule

It is also possible to export the set of dates in your schedule to an Excel spreadsheet by clicking the Excel icon which is also on the far right of the schedule screen.

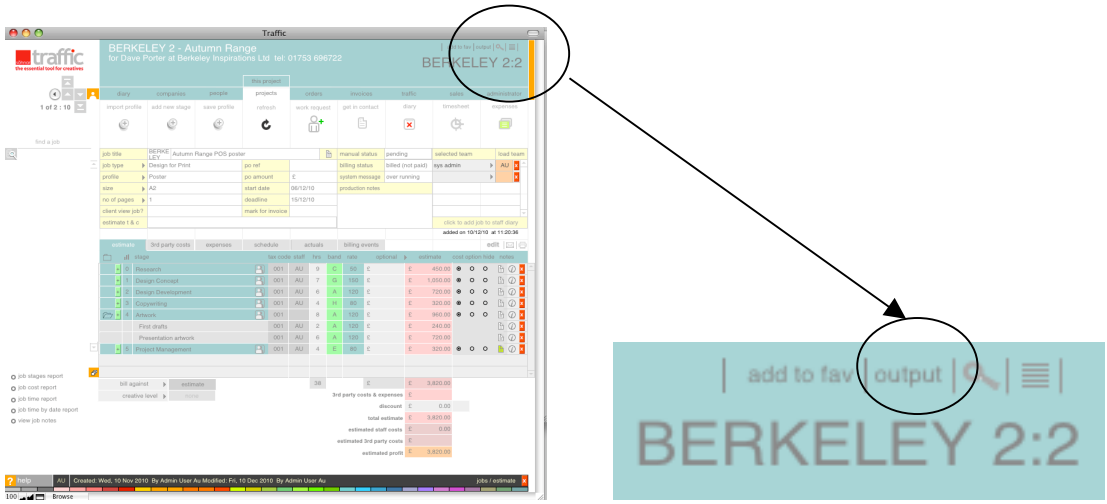


Please note this does NOT created a gantt chart in Excel, but it does transfer the dates to cells for you to use in a spreadsheet (sample shown below)

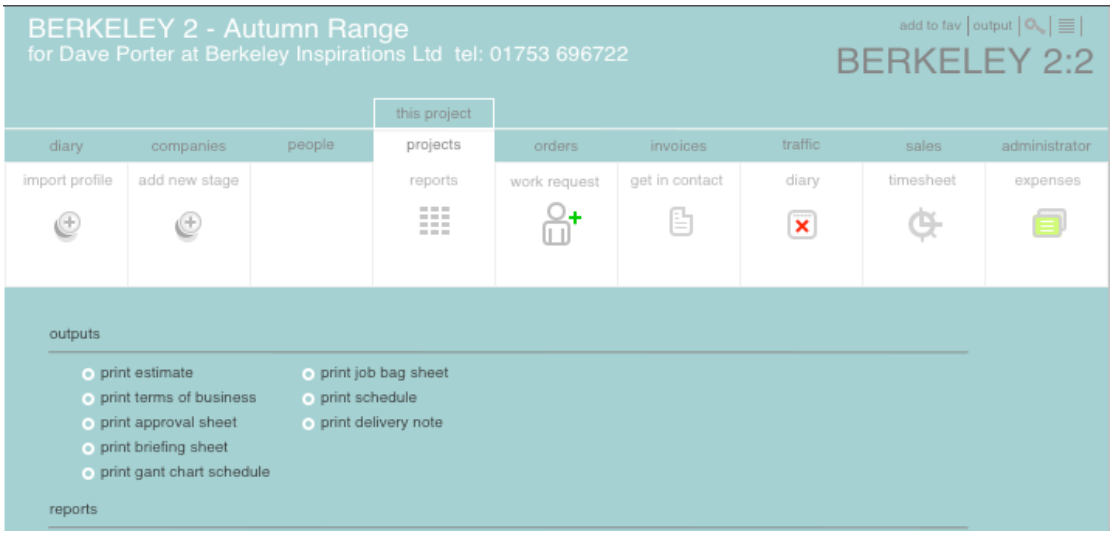
	A	B	C	D	E	F
1	type	title	staffCode	stageStartDateDisplay	stageEndDateDisplay	prodDays
2	stage	Research		10/11/10	11/11/10	2
3	stage	Design Concept		12/11/10	12/11/10	1
4	stage	Design Development		15/11/10	15/11/10	1
5	stage	Copywriting		16/11/10	16/11/10	1
6	stage	Artwork		17/11/10	18/11/10	2
7	task	First drafts		17/11/10	17/11/10	1
8	task	Presentation artwork		17/11/10	17/11/10	1
9	stage	Project Management		19/11/10	19/11/10	1

Other schedule print options

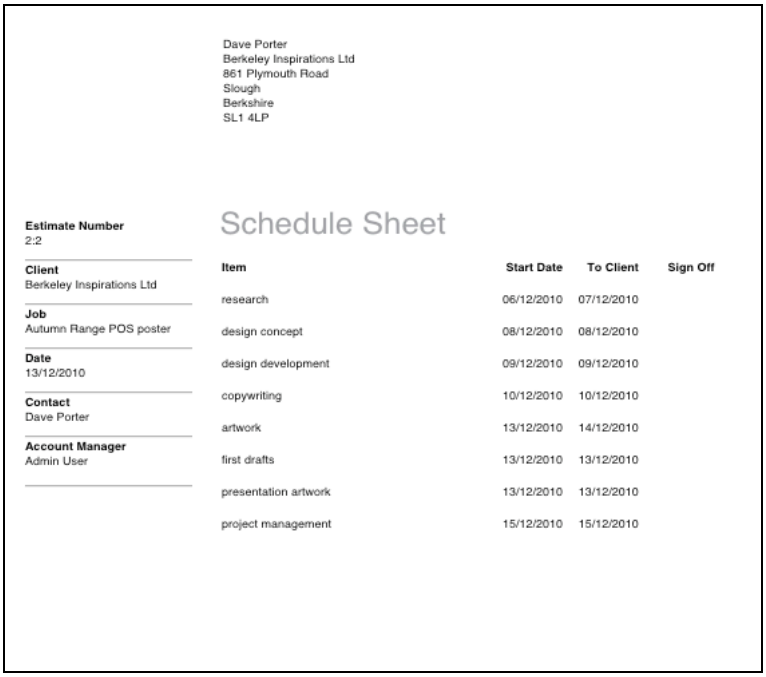
If you prefer to have a document style schedule rather than a gantt chart, there is one available, under the “outputs” option, which can be found on any job screen, in the very top right hand corner:



This takes you to a screen that includes options to print, save or email a number of useful documents:



The option to click for the document style schedule is marked as “print schedule”, click here and you will be able to output a printed document which shows the dates of the schedule in a list-style view:



Dave Porter
Berkeley Inspirations Ltd
861 Plymouth Road
Slough
Berkshire
SL1 4LP

Estimate Number
2:2

Client
Berkeley Inspirations Ltd

Job
Autumn Range POS poster

Date
13/12/2010

Contact
Dave Porter

Account Manager
Admin User

Schedule Sheet

Item	Start Date	To Client	Sign Off
research	06/12/2010	07/12/2010	
design concept	08/12/2010	08/12/2010	
design development	09/12/2010	09/12/2010	
copywriting	10/12/2010	10/12/2010	
artwork	13/12/2010	14/12/2010	
first drafts	13/12/2010	13/12/2010	
presentation artwork	13/12/2010	13/12/2010	
project management	15/12/2010	15/12/2010	

This document can be printed out or emailed to the client directly from traffic, if you follow the pop up instructions that appear.
Other documents in this area that you may find of interest are:

1. Print Approval Sheet

Dave Porter
Berkeley Inspirations Ltd
861 Plymouth Road
Slough
Berkshire
SL1 4LP

Estimate Number
2:2

Client
Berkeley Inspirations Ltd

Job
Autumn Range POS poster

Date
13/12/2010

Contact
Dave Porter

Account Manager
Admin User

Approval Sheet

Dear Dave

Your artwork is ready for sign off.

Please check the artwork carefully and select one of the options below. Post acceptance any additional revisions or errors in printed output will be for your account.

Please Tick As Appropriate:

Approved, No Amendments, Please Proceed ☐

Amend As Per Comments, And Proceed ☐

Amend As Per Comments, And Resubmit For Approval ☐

Print Name

Signature

Date

Comments

The text in here can be edited in the templates part of the Administrator area of Traffic.

2. Print Terms of Business

Dave Porter
Berkeley Inspirations Ltd
861 Plymouth Road
Slough
Berkshire
SL1 4LP

Estimate Number
2:2

Client
Berkeley Inspirations Ltd

Job
Autumn Range POS poster

Date
13/12/2010

Contact
Dave Porter

Account Manager
Admin User

Terms Of Business

GENERAL TERMS OF BUSINESS

THESE CAN BE SET UP AND AMENDED IN THE ADMINISTRATOR AREA OF TRAFFIC

PLEASE SEE LATER IN MANUAL FOR DETAILS

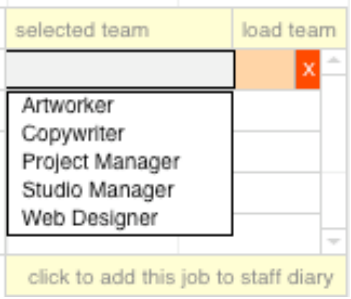
The text in here can be edited in the Administrator area of Traffic

The outputs area also contains other documents and reports, but these can all be accessed from other areas of the system, and will be discussed later in this manual.

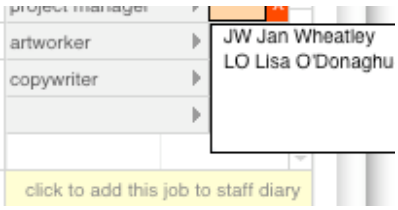
Adding staff to your schedule

On the far right of the main job screen you can now choose team members, which are the members of staff you want to work on the job in some capacity. Choosing a team means the people in it can view lists of just jobs they are involved in when they come to add timesheets. It also allows them to see a link to these jobs in their Traffic diary.

To add team members to a job, click in the fields under the heading “selected team” and you will see a list of job roles displayed. These job roles are defined by you in the Administrator area of Traffic and can be as detailed or as generic as you wish them to be. Please refer to the Administrator section of this manual for more details.

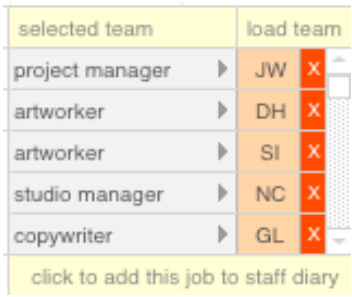


Continue selecting job roles until you have the required amount (you may choose the same role more than once).



After you have selected the job roles, click into the field beside each one to see a drop down menu, which will list all members of staff who have been assigned that job role in Administrator. There may be more than one staff member with the same role.

The team can hold as many staff names as you need. Use the scroll bar on the right of this area if you need to move down the list. If you add too many rows by mistake, use the red “X“ button on the line to delete them.

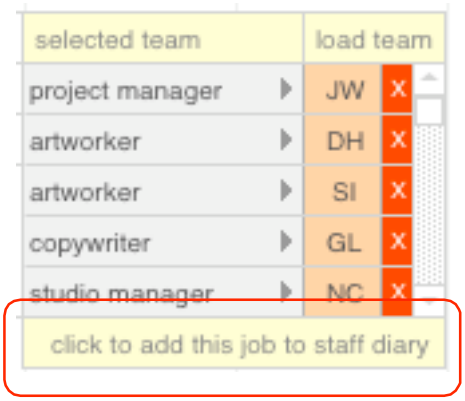


Load team

The load team button can be used to load a whole group of staff members to a job. Please refer to the section on Administrator/Staff to see how to set up teams of staff for certain clients.

Updating Staff Diaries

Finally, after setting roles and names for the full team, click the link underneath called “click to add this job to staff diary”:

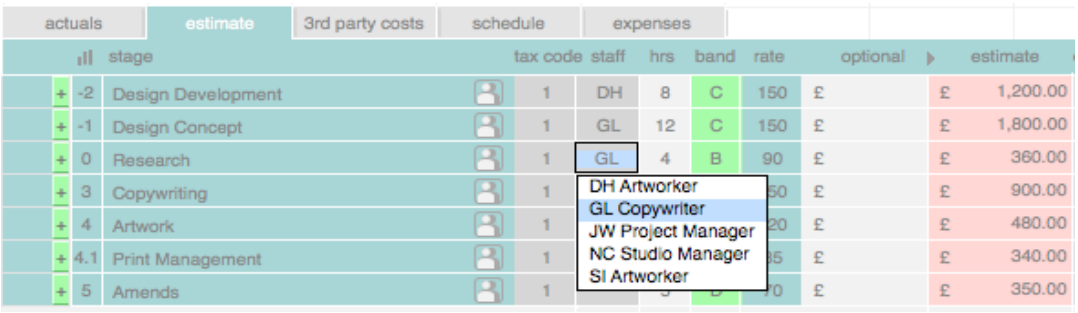


The “add to staff diary” button is an important step in the scheduling process. It creates a link to the job in the Traffic diary and of every member of the team, between the start and deadline date of the job. It also adds the job details into the Airtime calendar. This diary link allows Traffic users to see exactly what jobs they are currently involved in, and it also creates a quick link to the job when any member of staff in the team is adding timesheets. This diary link will be looked at in more detail after the scheduling section

Note: If you change team members or dates at any time, be sure to ALWAYS click this button again to refresh the updated information throughout the rest of Traffic.

Now that you have created a full schedule, you can decide which members of your team should be assigned to the various stages and tasks. To do this, you need use the names that you assembled as your team (described above) to populate the stages.

Each stage line has a field under the column header “staff”. Once you have loaded a team, the names of the staff in that team become available from a drop down window in this field. Use this to assign names to the stages.

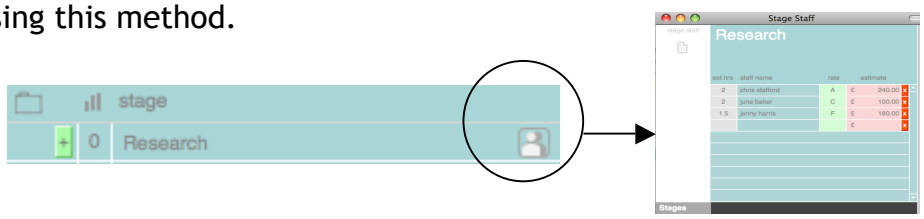


You can assign the names in either the “estimate” tab view, or in the “schedule” tab view. If you use the “schedule” tab view, you can also assign names against the events. You can only add one name to an event.

Remember that if a stage is split into tasks, you should enter a person against each task. There is no need to put any persons name against the stage, you should do your scheduling at task level if these have been used.

As with loading a team name, once you have entered staff names against stages, you must click the “Add to staff diary” button beneath the team window. This will send the information through into each team member’s diary area, and they will be able to see stages and tasks that they are working on in their diary.

Can I use the “add team” icon for scheduling?
You may add staff members to a job by clicking the “team” icon, which is on each stage line (estimate view only), but you **cannot** schedule people by using this method.



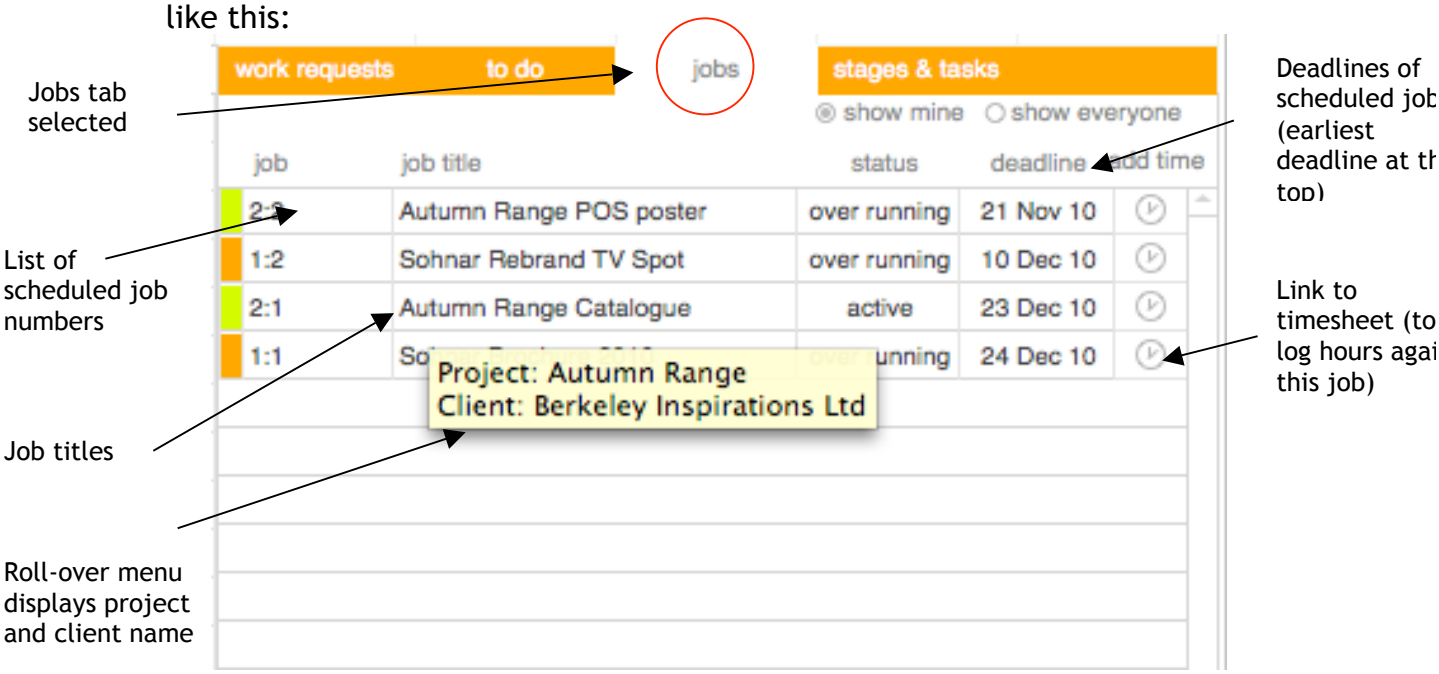
This process is explained in the section on creating an estimate (earlier in this manual), but to re-iterate, this is for job costing purposes only and cannot be used to scheduling. Use tasks if you intend to create schedules.

View Jobs, Stages and Tasks in the Diary

Scheduled jobs can be seen via a link in the Traffic Diary. The right hand side of the day-to-view diary has tabs that can show you what you are working on, on a daily basis. In this section we will look at the "jobs" and "stages & tasks" tabs.

The "Jobs" tab

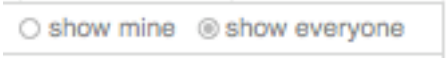
This tab shows you every job in Traffic that you are a member of the team for. If several jobs have been timetabled, your diary "Jobs" tab might look like this:



This list enables you to see at a glance all current (ie, pending or accepted) jobs in Traffic that your name has been added to. Jobs will start to appear in your diary on the start date of the job onwards, and stay there until the deadline date of the job has passed. The actual date that the link will cease to appear in your diary is 7 days after the scheduled deadline date of the job, OR if the job status is changed to "completed" or "closed" by the project manager (other job status settings may also stop the job appearing here, check with your administrator to see which ones apply).

You can see status of the job (which includes things like "active", "over-running", etc), and the deadline. There is also a link directly to the Timesheet function, so you can log hours directly against this job.

There is a choice of viewing just your own jobs on the screen or viewing all scheduled jobs. This is done by

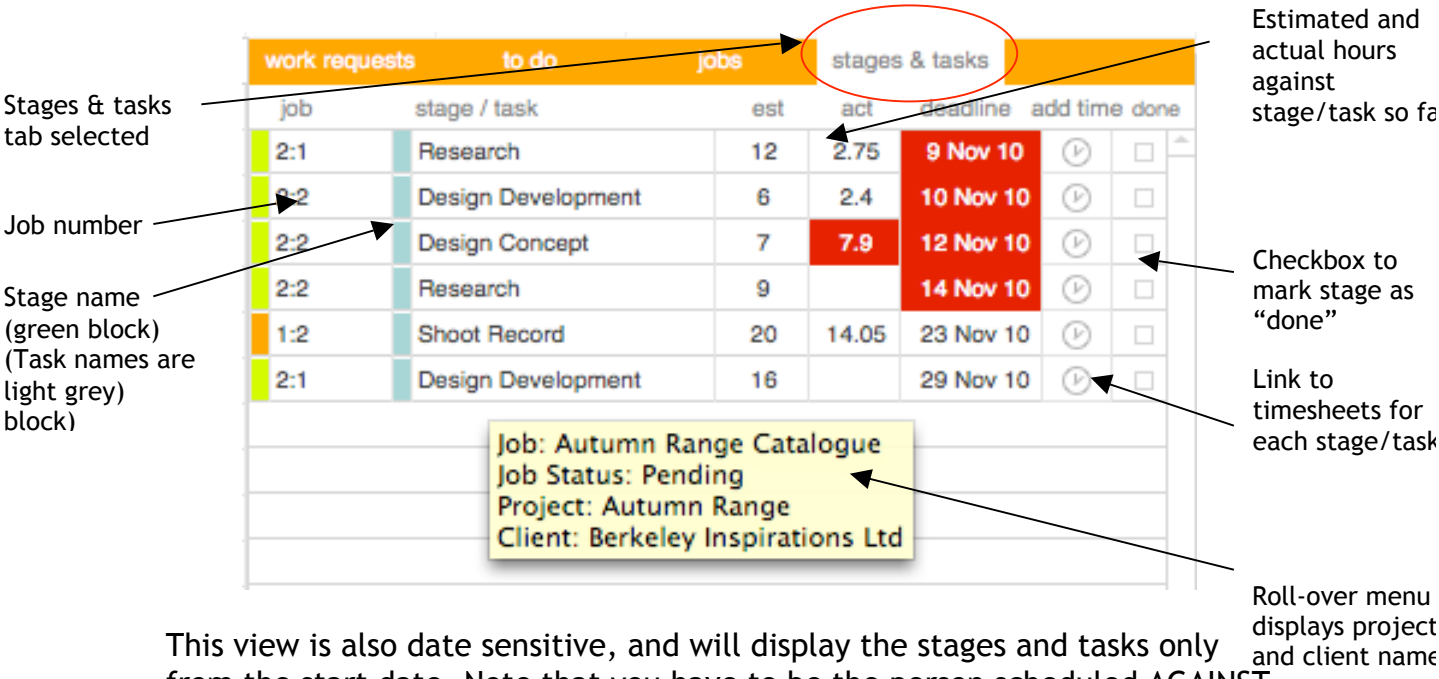


using the radio buttons “show mine” (which displays just scheduled jobs that you are in the team for), and “show everyone” (which shows all jobs scheduled for any team members).

Note: If you have scheduled a job and there is no link in your diary, check that the job has a START and DEADLINE date (otherwise the system cannot know which dates to add the link to), and that you have clicked the “add to staff diary” button on the main job screen.

The “stages & task’ tab

The tab directly to the right of the Jobs tab will show you a similar view that displays any stages and/or tasks that your name has been assigned to in the job schedule.


work requests
to do
jobs
stages & tasks
job
stage / task
est
act
deadline
add time
done
2:1 Research 12 2.75 9 Nov 10
2:2 Design Development 6 2.4 10 Nov 10
2:2 Design Concept 7 7.9 12 Nov 10
2:2 Research 9 14 Nov 10
1:2 Shoot Record 20 14.05 23 Nov 10
2:1 Design Development 16 29 Nov 10
Job: Autumn Range Catalogue
Job Status: Pending
Project: Autumn Range
Client: Berkeley Inspirations Ltd
Stages & tasks tab selected
Job number
Stage name (green block) (Task names are light grey) block)
Estimated and actual hours against stage/task so fa
Checkbox to mark stage as “done”
Link to timesheets for each stage/task
Roll-over menu displays project and client name

This view is also date sensitive, and will display the stages and tasks only from the start date. Note that you have to be the person scheduled AGAINST THE STAGE OR TASK on the job schedule screen to have items appear in this list. You cannot view stages and tasks for other people in this section

It also shows you the estimated and actual hours worked so far (the actual hours are for the job as a whole, not necessarily just ones you have logged yourself). Note that if the stage or task has overrun (more timesheet hours recorded than were estimated), the number under “act” (actual hours) will turn **RED**. Note also that if the stage is still in the diary after the intended deadline date has passed, then the deadline date of the stage will also turn **RED**

To clear stages or tasks from the diary after they are completed you can check the “done” checkbox on the far right of each line description. This

will remove it from the diary, AND mark it as “status completed” in the job overview screen.

Finally, there is also a link for logging time directly to the stage or task that the hours are intended for, which is the clock icon on the far right of each line.

Note: If stages and tasks are not appearing in your diary, check that your name has been assigned to the stage or task in the job, AND that the stage or task has been scheduled, AND that the “click to add to staff diary” button has been pressed.

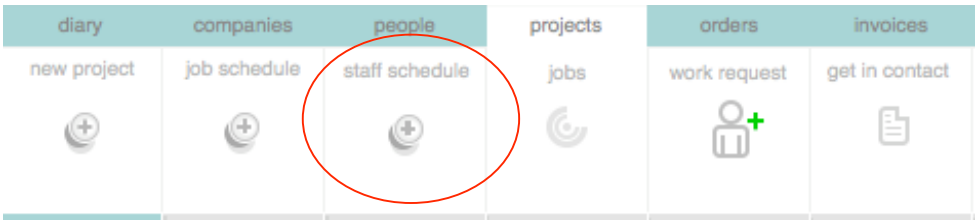
As well as placing a link in each Traffic user’s diary, schedules can be seen in a broader summary, in Studio Schedule screens that show all staff members’ schedules, and all scheduled jobs in the business.

SCHEDULE OVERVIEWS

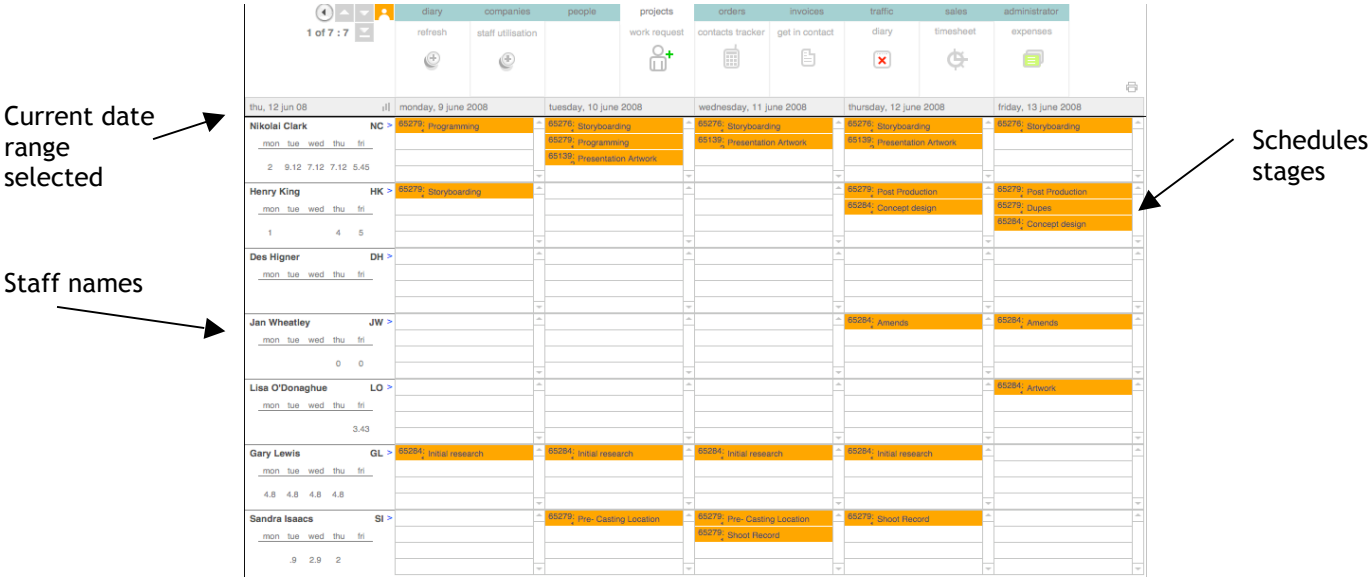
The Traffic system allows users to schedule using a variety of methods. Your system may be set up with original scheduling, or you may have the new style Drag and Drop scheduling, or Smart Scheduling. This manual covers all the available methods, beginning with original scheduling. Please note that your system may not have this feature in operation, in which case you should refer to the later sections on Drag and Drop scheduling, and Smart Scheduling.

ORIGINAL STAFF SCHEDULING

On the main “Projects” tab, you can access the Staff Schedule by clicking the “staff schedule” plus button at the top of the screen:

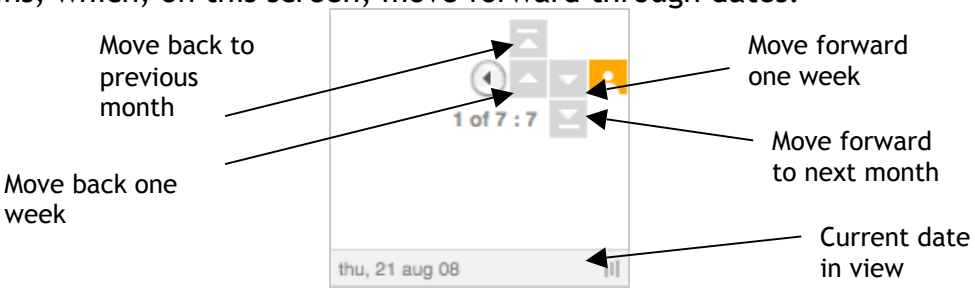


With several jobs scheduled, the staff schedule will look something like this:

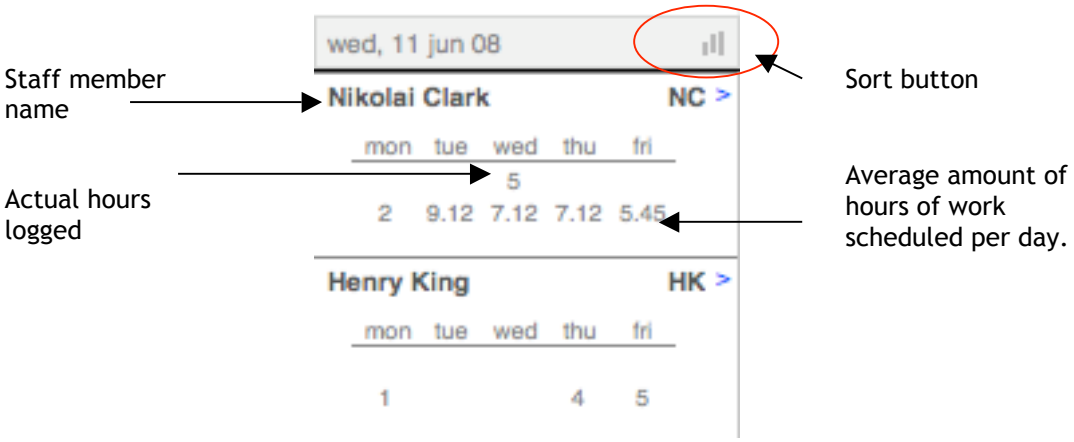


There are several ways to view/use the information on this screen. The coloured bars represent stages or tasks. A bar will appear on every production day that stage was scheduled to run for when the job schedule was created.

The coloured bar will display the project number and stage/task title. The view is for one week. You can navigate through weeks, using the navigation buttons, which, on this screen, move forward through dates.


Move back to previous month
Move back one week
1 of 7 : 7
Move forward one week
Move forward to next month
thu, 21 aug 08
Current date in view

On the left is a column displaying each staff member's name. At the top of the column of staff names is a sorter button to put the records into alphabetical order by first name (the default order is the order the staff records were created in).

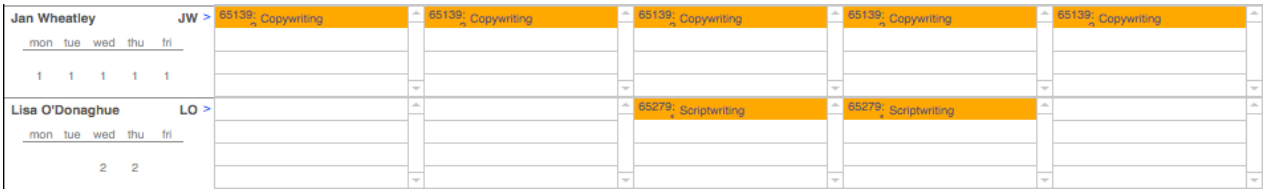


This section also contains a 5 day view of scheduled work for that person. This corresponds to the week currently in view. The figures appearing directly under each day show the amount of hours logged on that day. In our example above, Nikolai has logged 5 hours on Wednesday.

The second row of figures is a guide to how much time that person has been scheduled for, and can be used by resource planners who need to see which members of staff are free and which are busy on certain dates.

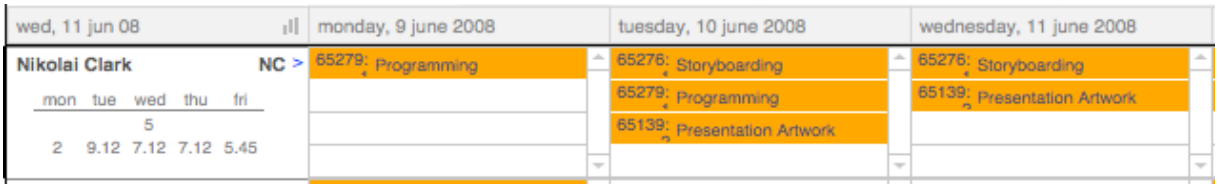
This figure is generated by Traffic, and it is based on the Job schedule and estimated hours of work, both of which are built in the projects area. For example you might estimate a job at 4 hours work, but schedule it to run over 2 days. The staff schedule screen would then show you an averaged-out amount of work for that person as 2 hours work on each date the stage was scheduled for.

In the example below, Jan is scheduled to work on the copywriting stage for five days, but the stage was estimated as 5 hours work. The staff schedule displays Jan as being busy for one hour each day. Lisa has been given two days to complete a stage with an estimate of 4 hours, so she is busy for an average of two hours each day.



As you timetable more stages for the same person, the time they are going to need each day to do this work will build up.

In this second example, Nikolai has been scheduled on more than one job, and the schedule is suggesting he would need over 9 hours on Tuesday and over 7 hours on Wednesday to complete the required work in the scheduled time.



In this way, planners can see whether staff have been scheduled with too much work (or not enough), and re-arrange some of the allotted tasks accordingly. Remember that these figures are averages that suggest what the workload would be if that person spent the same amount of time on a stage each day across the whole scheduled period.

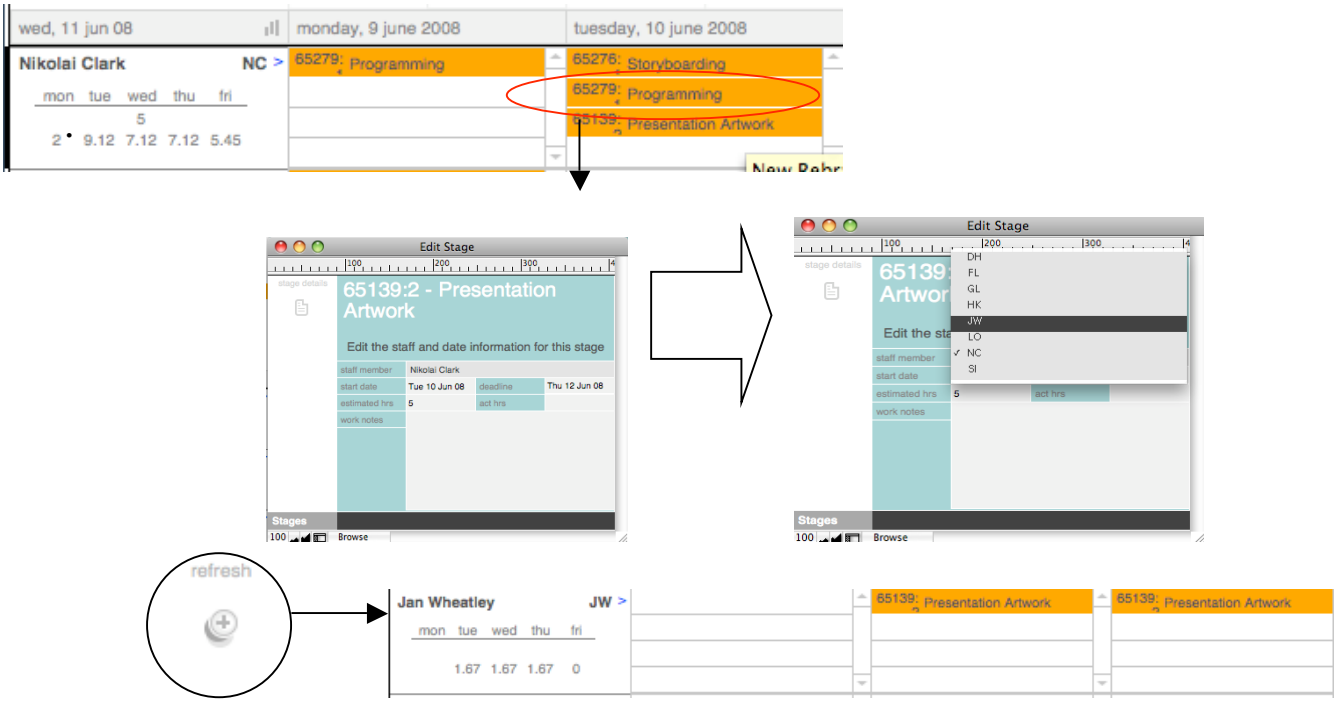
Re-assigning stages

You can re-assign the stages or tasks from one member of staff to another directly from this screen:

Click on the coloured bar that shows the job number and stage name.
This will open up a new window, displaying the stage and the name of the person currently scheduled to do it.

Click on the staff member's name, and select a different person from the dropdown list.

Close the window, and click the refresh button at the top of the screen
The stage or task will be moved from the original staff member to the new one.

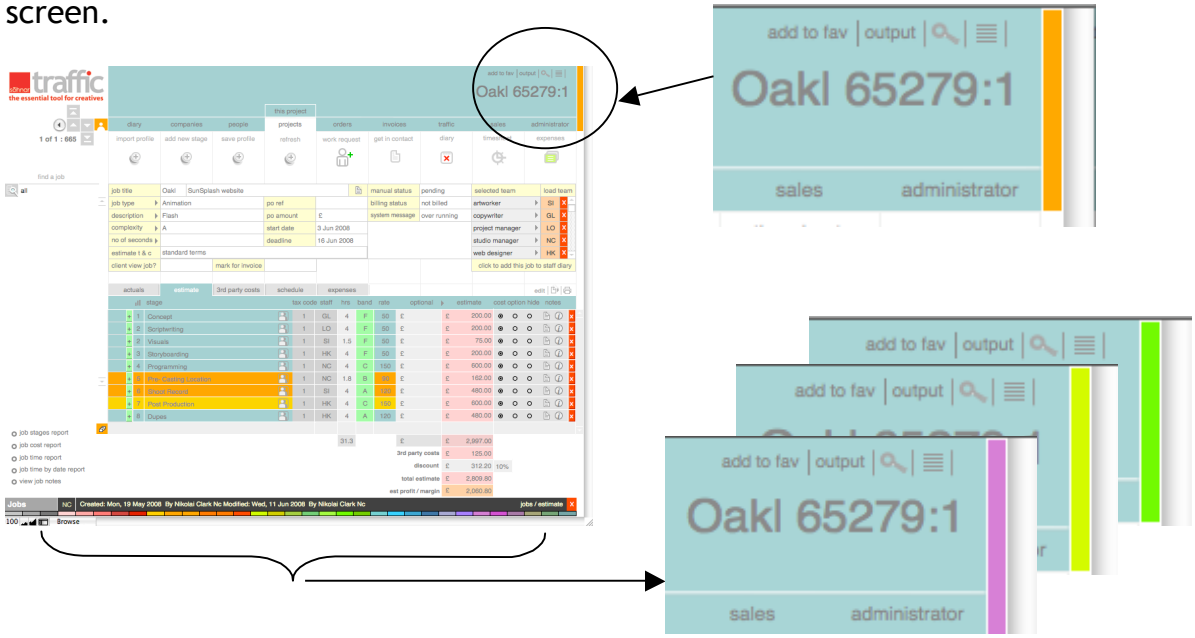


Changes made in this way will feed back through the Traffic system to the job schedule screen AND to staff diaries and “my jobs” lists automatically.

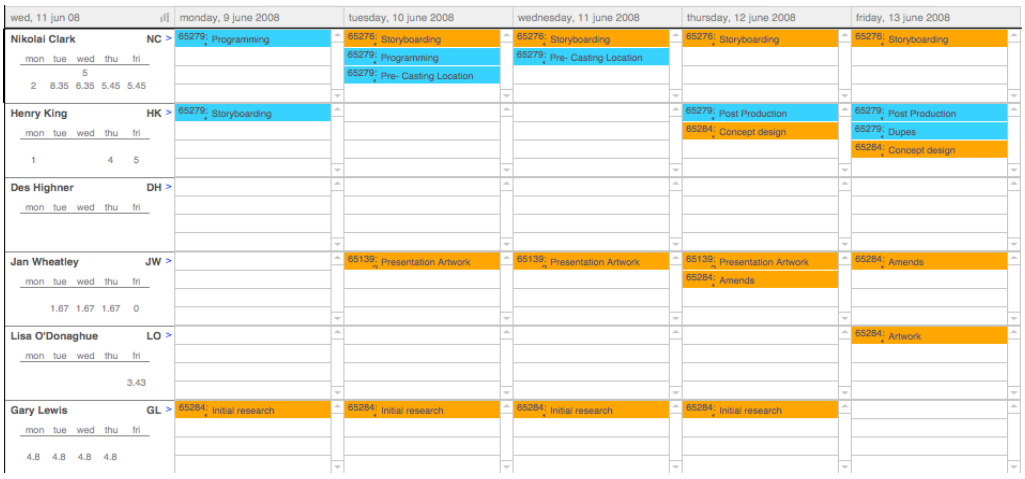
Adjusting colours on the staff schedule

You can change the colours of the stages on this screen. In our example, all the colour bars are a default orange, but this can be changed, by altering a colour setting that appears on the job screen. In this way you could identify or colour-code jobs in various ways, such as choosing a colour per client, per project handler, or simply differentiate between top priority jobs and ones of lower importance.

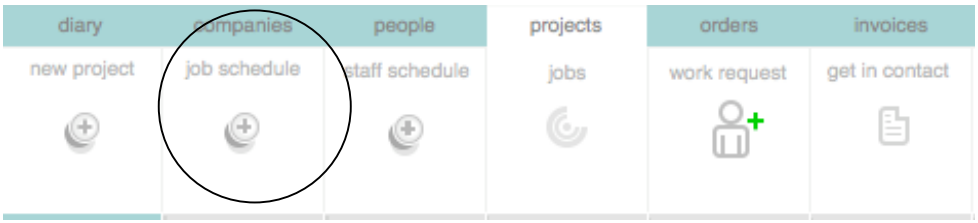
To change colours for the staff schedule, open the required job screen and you will see the default colour option in the top right hand corner of the screen.



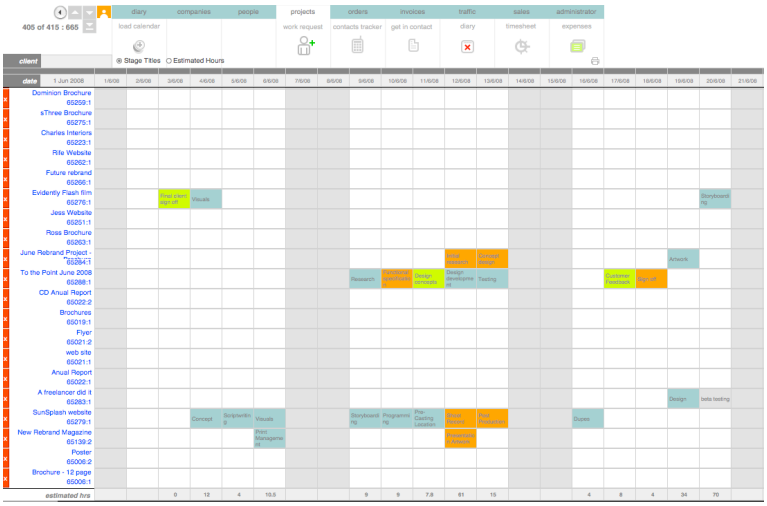
Click on of the colours along the bottom of the screen to set a new colour for that job. The colour you choose will now display all stages for that job on the staff schedule screen in that colour.



ORIGINAL JOB SCHEDULE

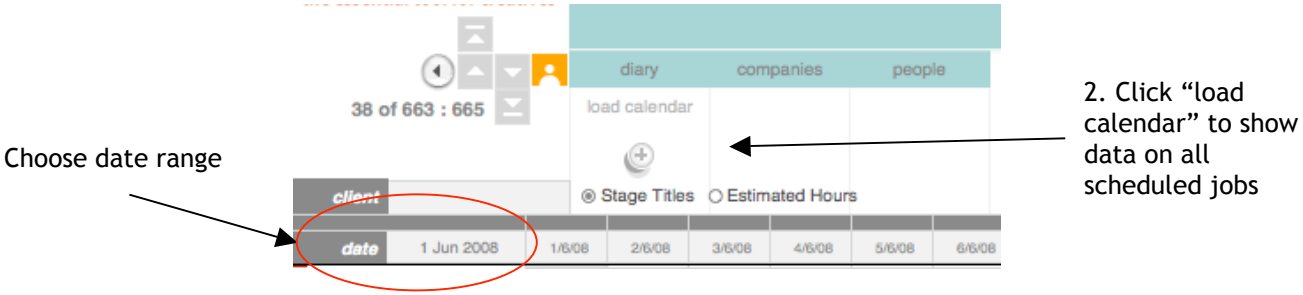


The Job Schedule tab lets you look at scheduled jobs in a different way. This screen displays all deadlines of stages and events of scheduled work in the same view. A four week period is displayed, and you can view any selected time period, and even filter by single clients. With several jobs scheduled, the Job Schedule screen will look like this:



The screen shows each job on a single line, and every coloured block on the chart shows the deadline date of a stage or task. The Job Schedule also shows events.

To refresh the chart, you need to set the date range you wish to view at the top left hand corner of the screen, and then click the “plus” button at the top of the screen named “load calendar”.



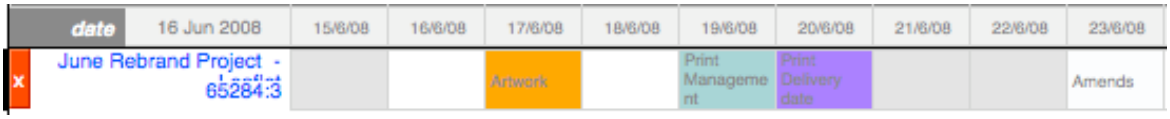
You can also use the box marked "Client" to filter out results and show jobs for just a single client. You can also select whether each date block shows the stage name or the amount of estimated hours of that stage by selecting "Stage Titles" or "Estimated Hours" (the default setting is the stage name).

Once you have clicked the calendar button, the jobs that have been scheduled for period will be displayed on a line each, like the following example:

Stage and Event Colours

Note: Events show in the default colour of yellow and stages show in the default colour of grey. However these colours can be altered manually in the job schedule area. In the main job schedule screen, each stage or event line features a small colour bar icon. Click on this opens the Schedule Colours menu.

The Schedule Colours menu allows you to choose from a selection of colours and use them to colour code various stages or events. The colours, along with the names that you see against each colour are set in Administrator and this is covered later on in this manual. By clicking on colours in this window, you can set different colours for your stages. The effect of this can be seen in the Job Schedule:



If you set the same colours on similar stages across all your jobs, you can use the Job Schedule chart to easily identify when key stages or events are coming up across your whole business, for example, all dates when invoices should be raised, or dates of final delivery of work.

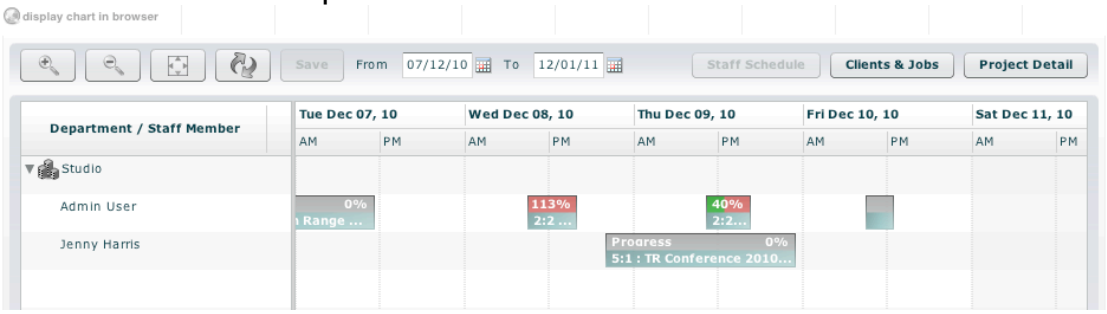
DRAG AND DROP SCHEDULING

Drag and Drop Scheduling is a new option that can replace the static Staff Schedule and Job Schedule in Traffic. You can choose to use whichever method you prefer, however the two cannot be alternated between once set.

Getting started

For a job to display on the drag and drop schedule it must have been estimated and scheduled in the usual way within Traffic, and the “add to staff diary” button clicked. Please refer to the general section on scheduling for more details on this.

Drag and Drop Scheduling can be accessed from a number of places within Traffic. The schedule uses web elements, and there is a short loading time, but when the screen opens it will look like this:



Each time the module opens the user has a choice of three differing views, which are selected in the top right hand corner of the screen.

Staff Schedule

The left hand pane shows Department followed by Staff.
Opening this tree will show all staff in the department and the workload they have on.

Clients and Jobs

The left hand pane shows clients, projects and jobs.
This view will show you how much work you have on for your clients.

Project Detail

The left hand pane shows projects, jobs, and then stages / tasks. This view breaks down a job so you can see its component parts.

You can switch between these views at will, which is a fast and efficient way to check that your changes make sense at all levels.

Loading

Drag and Drop will typically take some 10 seconds to load its data. If the loading period is significantly in excess of this you can adjust how much data the module is loading. This explained at the end of this section.

Drag and Drop needs Flash player 9 or higher to be installed on the machine that you are using to run Traffic. Most machines will have this installed in any event. If the Flash player is not installed it will load itself, but you may need to restart Traffic before it runs correctly.

The Display

The display will show closed jobs, pending and live jobs as long as they have been scheduled.

Closed jobs are displayed in very light grey. This allows you to look back in your schedule to see jobs that have been completed.

Pending jobs are displayed in mid grey. This is an effective way of pencilling in resources for jobs you think are going to happen, but are not yet confirmed.

The administration section allows you to show pending jobs in colour if you regularly treat pending jobs as live jobs in Traffic (some users do).

Live jobs are shown in colour, and adopt any stage colour that you have assigned to them.

The Job Bar

The job bar is split into two parts

- The upper Bar
  - Shows how much of the estimated time has been used. If this exceeds 100% the bar will turn red to let you know the stage has gone over time.

- The Lower Bar
  - The lower bar shows the stage name.

By hovering you mouse over the bar you will see additional job information. Clicking on the bar will bring up the stage notes. This text will be truncated if it exceeds 200 characters.

If the task is dragged beyond the scheduled end date of the job, you are warned by its boarder turning red.

Changing what you see

Zooms the display in and out. You can zoom down to the minute.

Changes the zoom of the display so that all data fits within a single view.

Clicking the month, quarter and so on will zoom the display to that quarter, month week etc.

Refreshes the view. This will take the same time as when the module initially loads – ie approximately 10-15 seconds.

Changes the date the schedule is shown to and from. By default the systems opens today less 10 days to today plus 30 days. This can be changed in administration.

Dragging and Dropping

All stages and tasks by default commence at 9am and finish as determined by their length relative to the length of the working day set in the administration area of Traffic.

Example a 1 hour stage will start @ 9am and finish at 10am. A 10 hour stage where the system is set to an 8 hour working day will start at 9am on Day 1 and finish at 11am on Day 2.

Initial scheduling takes account of weekends, public holidays and so on, but you may drag jobs as you choose without restriction.

You can drag the whole entry or make the bar longer of shorter. The length of the bar only reflects the time you are allocating someone to undertake the task . *Re-sizing a bar will never change the estimated hours*. If you believe your estimate is incorrect you must amend it in the usual manner. This feature ensures that scheduling is doing not amending your estimates. Note: although you can make the bar shorter, you cannot make a bar shorter than the amount of time estimated against the stage.

Scheduling Changes compared to prior versions of Traffic

The scheduling function works as before with one exception. The system used to treat the deadline date as a non working day. It was a “to be done by date”. In this version jobs started today that are less than a working day of hours will end today.

Please note that jobs scheduled by Traffic prior to this upgrade will display showing their previously calculated end dates. Additionally the time of the stage will show as 00:00. These jobs will rapidly work their way through the system, or should they be longer running, simply reschedule them to bring the scheduling into line.

Restrictions

Depending upon where you have opened Drag and Drop Scheduling within Traffic you may only see:

- one project
- one person

Additionally in the administration section you can restrict individuals so that they cannot drag / drop dates – only view.

Saving

Each time you make any changes to the schedule, those changes will need to be saved. This is a change from regular updating of data in Traffic. To remind you the SAVE button turns red once data needs savings.

The save operation is undertaken in the background and hence you may notice it takes Traffic a few seconds to show your changes.

If you navigate away without saving your changes will be lost.

Opening in a browser

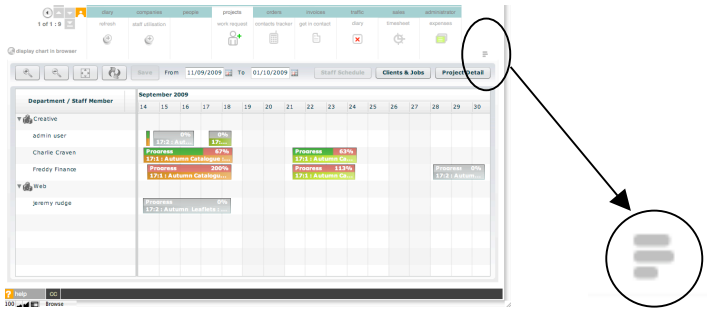
There is a button at the top left of all views that allows the view to be opened in a browser as opposed to within Traffic.

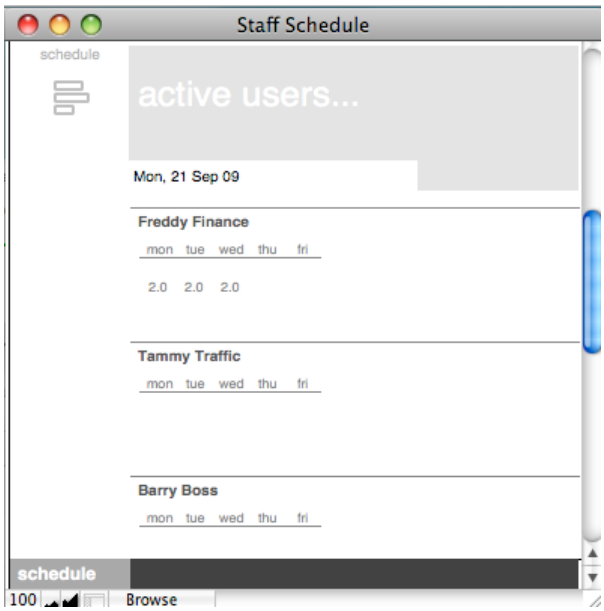
This is useful if you require a bigger view, or you wish to use Traffic whilst scheduling to check something.

This option would also allow the studio work schedule to be displayed on a plasma screen for example.

Seeing workload

It is still possible to access the “workload” function that shows how much of someone’s time has been allocated. This is now viewable in a standalone window, opened by clicking the small bar icon at the top right of the schedule area.





The date range of the workload window can be changed by clicking on the date at the top left of the window

Administration

There are two administration areas that control Drag and Drop Scheduling

Administrator / Preferences.

Drag n drop

Allow you to set how many days before / after today the function loads by default. If loading data is taking significantly longer than 10-15 seconds then these variables can be changed.

Tree Open

Sets the module to open with the menu tree in the left bar open or closed. It can be faster to select data if the tree is closed by default.

Colour pending

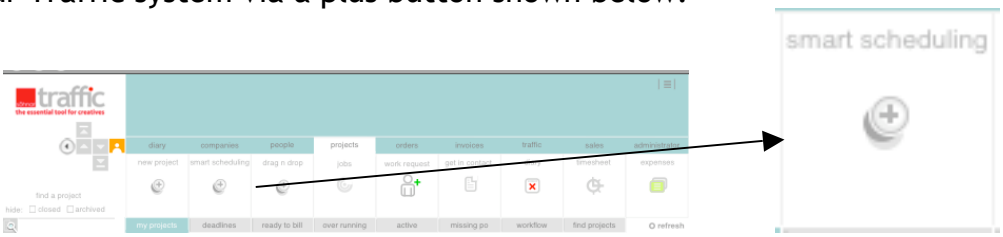
Allows pending jobs to be shown as live jobs. Some Traffic users do not make use of the job status function and this allows pending jobs to be shown in colour.

Administration / Staff/ Management

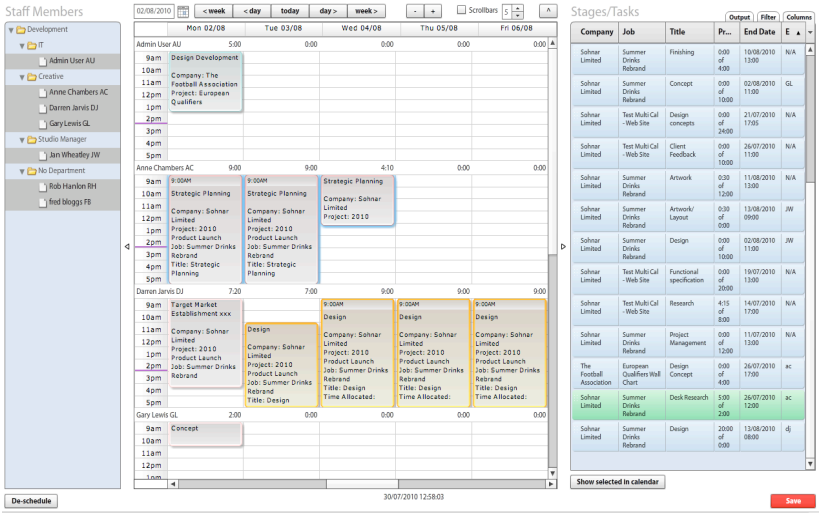
Drag Resize allows administrators to restrict staff members to viewing the schedule only. This option is set per member of staff, so it can be found under the Staff icon, within the management tab for each person.

SMART SCHEDULING

The newest scheduling system in Traffic is called Smart Scheduling. It allows you to see and schedule work for multiple members of staff within your agency quickly and easily. It can be accessed from the project home page in your Traffic system via a plus button shown below:



Clicking this icon will open the multi-calendar screen in a web browser (your default browser will automatically be launched).



Once opened, Multi Calendar can be refreshed at any time by using your browser refresh functions. It can also be closed and launched again from the Traffic screen to refresh

The screen will show the following information:

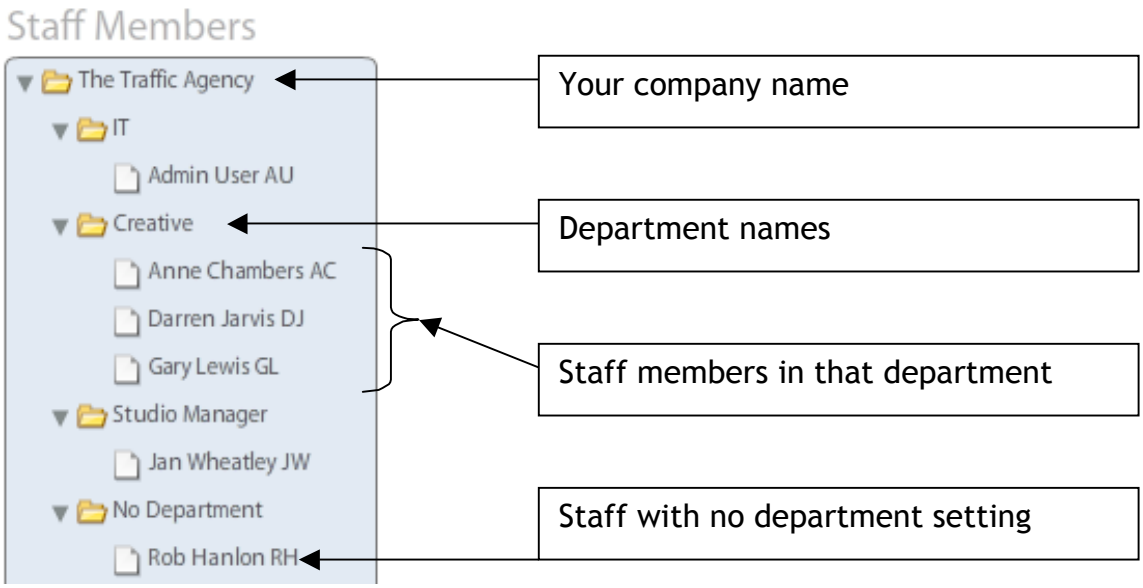
1. A list of all your active staff members on the left hand side, grouped by department
2. A week-to-view calendar in the centre of the screen to display scheduled work for selected staff
3. A list of work on the right hand side, which can show scheduled or unscheduled work.

This guide will take you through each of these sections of Multi Calendar in turn.

Staff Members

On the left of the screen is a list of active staff at your agency. You will see a tree style menu that has your company name at the top, and is then broken down into departments. Staff can be assigned to a department in the main Traffic system under the Administrator tab.

There will also be a default folder called “no department”, under which you will find any staff not assigned to a department. This appears at the end of the list of departments. If you don’t set departments up in Traffic, all of your staff will be listed here.



You can select staff members from this list and view their schedules in the central area of the screen.

To see a single person’s schedule, click on their name to highlight it and that person’s calendar will be displayed.

To see all staff from any department, click on the department name, and all staff under that header will be highlighted, and their calendars displayed.

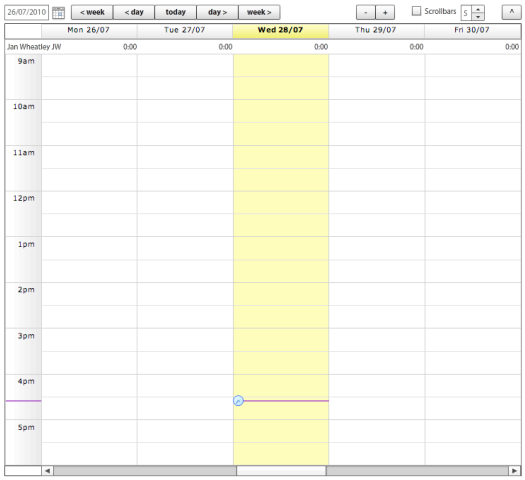
To see all staff at your company, click on your company name at the top of the whole list, and all staff names will be highlighted and displayed.

To see a selection of your own choice, hold down the Ctrl or Apple key while clicking on multiple staff names, to highlight and display the selected staff calendars.

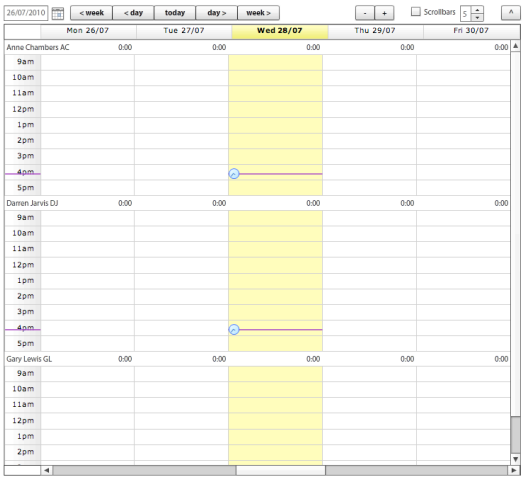
The Multi Calendar

The central area of the screen will show you the calendar(s) for all the selected members of staff. The appearance of the window will depend on how many people are selected. If you have selected a single person, the screen will show a single week-to view calendar. If you have selected several staff members, the screen will be divided horizontally to show a week-to-view calendar for each selected person.

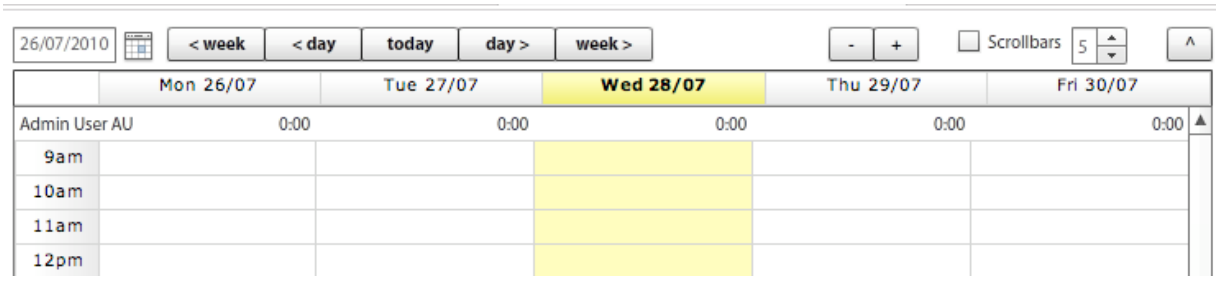
Single person view:



With three people selected:



The central calendar has other functions along the top of the window that let you control how the information is displayed:



Date selector:

Choose the date range displayed on the screen

Date Range selector:

The calendar shows a 5 day week-to-view by default, starting with Monday on the far left. Use these buttons to alter the range of days being displayed.

The “<week” and “week>” buttons will move the displayed range of dates forwards or backwards one week at a time.

The “<day” and “day>” buttons will move the displayed range of dates forwards or backwards one day at a time.

The “today” button will reset the screen to show today’s date (ie, the screen will show the current week)

Note that the Multi Calendar allows you to see the full 7 days of a week, but the default display of any week shows only Monday to Friday. To display Saturday and Sunday on the screen, use the “<day” and “day>” buttons to move the calendar along so that these days are visible.

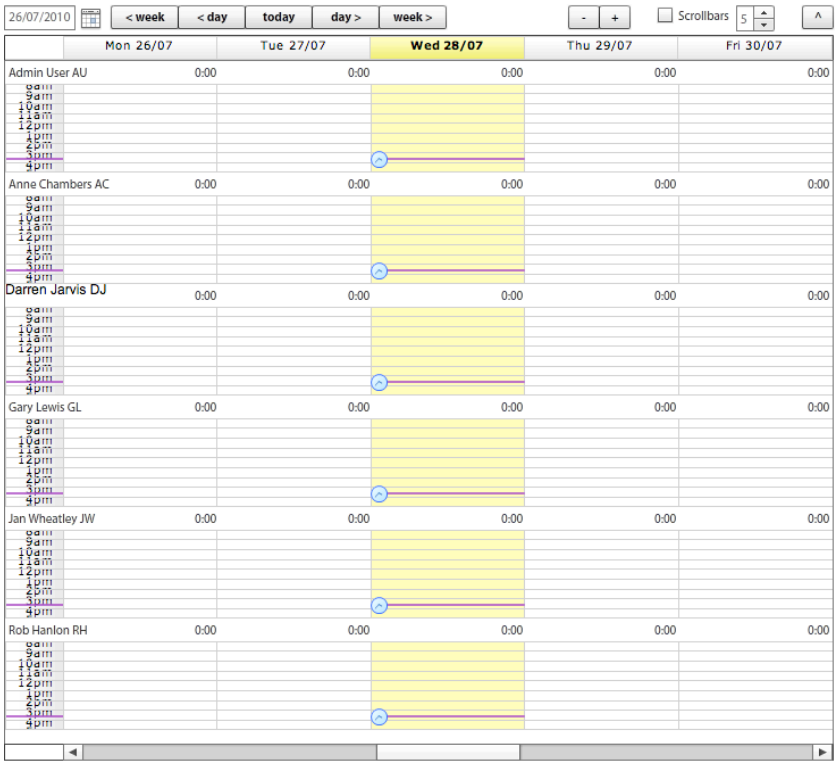
Workload

The Multi Calendar screen will show the total amount of time allocated with work on each person’s diary. At the top of each calendar day you will see a number, which corresponds to the amount of time blocked out on that persons schedule for that day.

Plus/minus buttons:

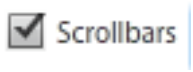
By default, the calendars appear at a standard size and you can browse them with the aid of a scroll bar on the right (which appears automatically), or, you can control the view by using the plus and minus function buttons. Clicking these will vertically expand or compress the calendars visible on screen. With just one or two calendars being displayed you may not need to adjust the view, but with more than 3 people selected, the screen size can be adjusted to show the information more comfortably for the user.

Calendar with 6 selected users, compressed using "-" button:

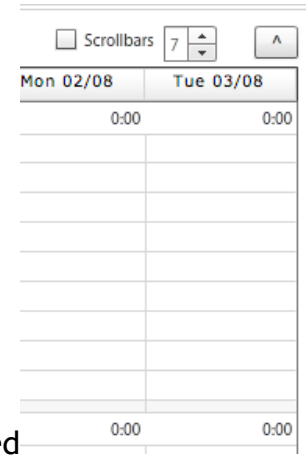


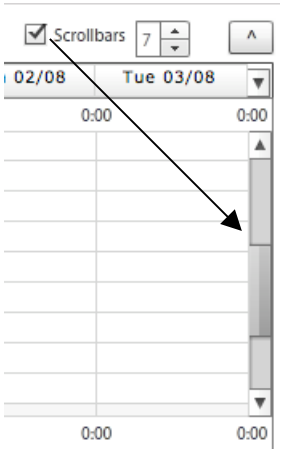
Even with only one user selected you can still zoom closer in on the single calendar if you need to.

Scroll bar checkbox



Check this to add a scroll bar to the right hand side of each individual calendar. The calendars display a period from 9am to 6.00 pm by default, but this scroll bar function allows you to move the time range up or down to display times before 9am and after 6pm.

Scroll bar disabled 

Scroll bar enabled 

The scroll bar is linked across all calendars currently being displayed on the screen, so you only have to adjust one calendar scroll bar and all the other calendars on the screen will move at the same time

Number of Days option

This allows you to set the number of days visible on the calendar screen. The default is 5 days (Monday to Friday), but by using the up and down arrows you can reduce this down to show less days, as far as showing just a single day on the whole window you wish. You can also free-type the number required into the box.

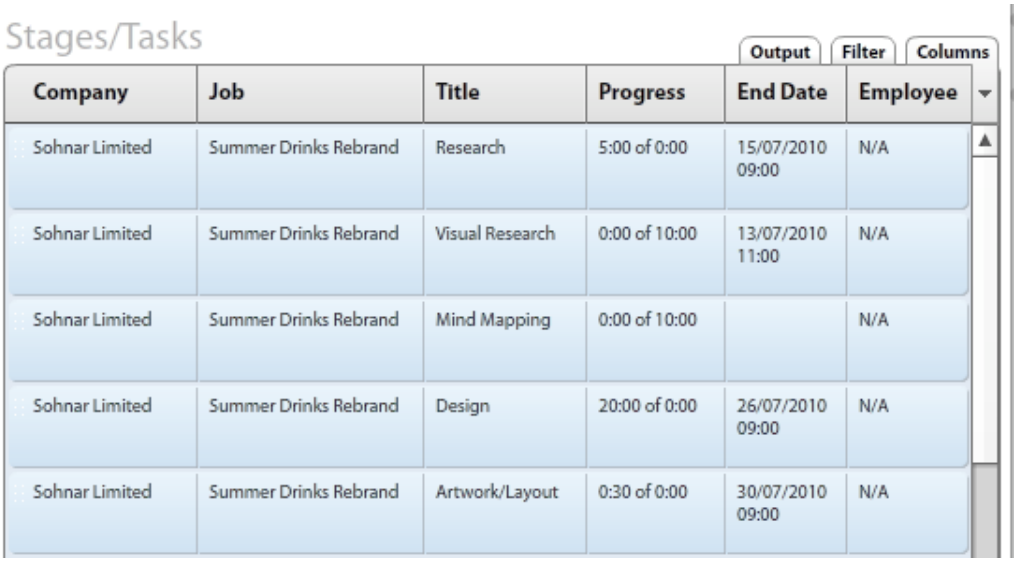
The maximum number of days that can be viewed is 7.

Full Screen Mode

Click this icon to expand the Multi Calendar screen to fill the monitor, by hiding the browser window borders and functions completely. You can quit full-screen mode by clicking the icon again, or pressing the “Esc” key.

Stages / tasks list

On the far right hand side of the screen is the stages and tasks list. This shows work that has been created in Traffic.



This shows (by default) the following columns:
Company name
Job name
Title (which is of the stage/task)
Progress (this shows how many hours of actual time have been logged against the stage)
End date (of the stage)
Employee name if a person has been allocated to the stage, otherwise this will display “N/A”

The default setting will display a list of all work that is unscheduled in Traffic. This means that the initial view when you open Multi Calendar will show N/A in all the “Employee” column. This will give you an immediate overview of how much work in your studio has not yet been scheduled. You

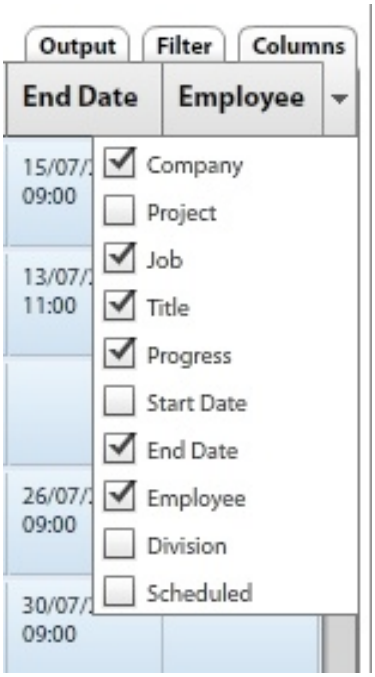
will be able to assign this work quickly using Multi Calendar, which we will look at in the next section.

Changing the view of stages/tasks

To change the display of information, you can use the settings shown above the list.

Columns

Move your mouse over the “columns” header to display the menu that allows you to choose which information is displayed



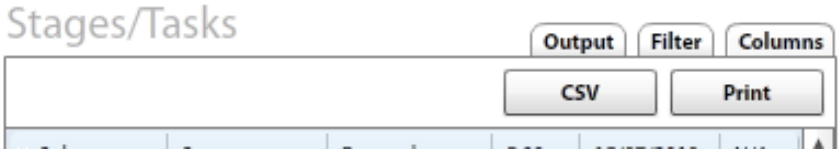
You can see from the image that the default columns are checked. Simply uncheck any that you do not need to see on the main screen, and check any others that you wish to see. The other columns are:

Project (project name)
Start date (of stage or task)
Division (shows Traffic division that the project was created in)
Scheduled (shows “true” or “false to denote if stage is scheduled or not)

Once you are on the main screen again, you can also move the columns into a different order by clicking on any column name and dragging it left or right to change the order of the displayed columns

In addition to this you can also click onto any column name itself, which will then sort the whole list of stages into alphabetical order by the selected column.

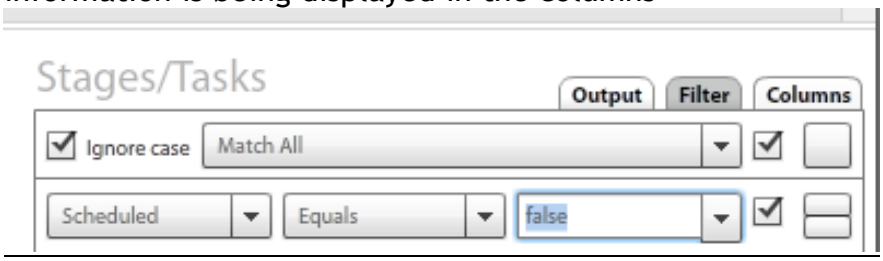
Output
Move your mouse over the “output” header to display options to output to csv file or print the list of stages.



The output will show information from whichever columns you have selected to display at the time of clicking the “output” function.

Filter

This panel allows you to set advanced options that control which information is being displayed in the columns



The default setting for this function is to show unscheduled work. The filter line will be set as above using the terms (from left):
Scheduled Equals False

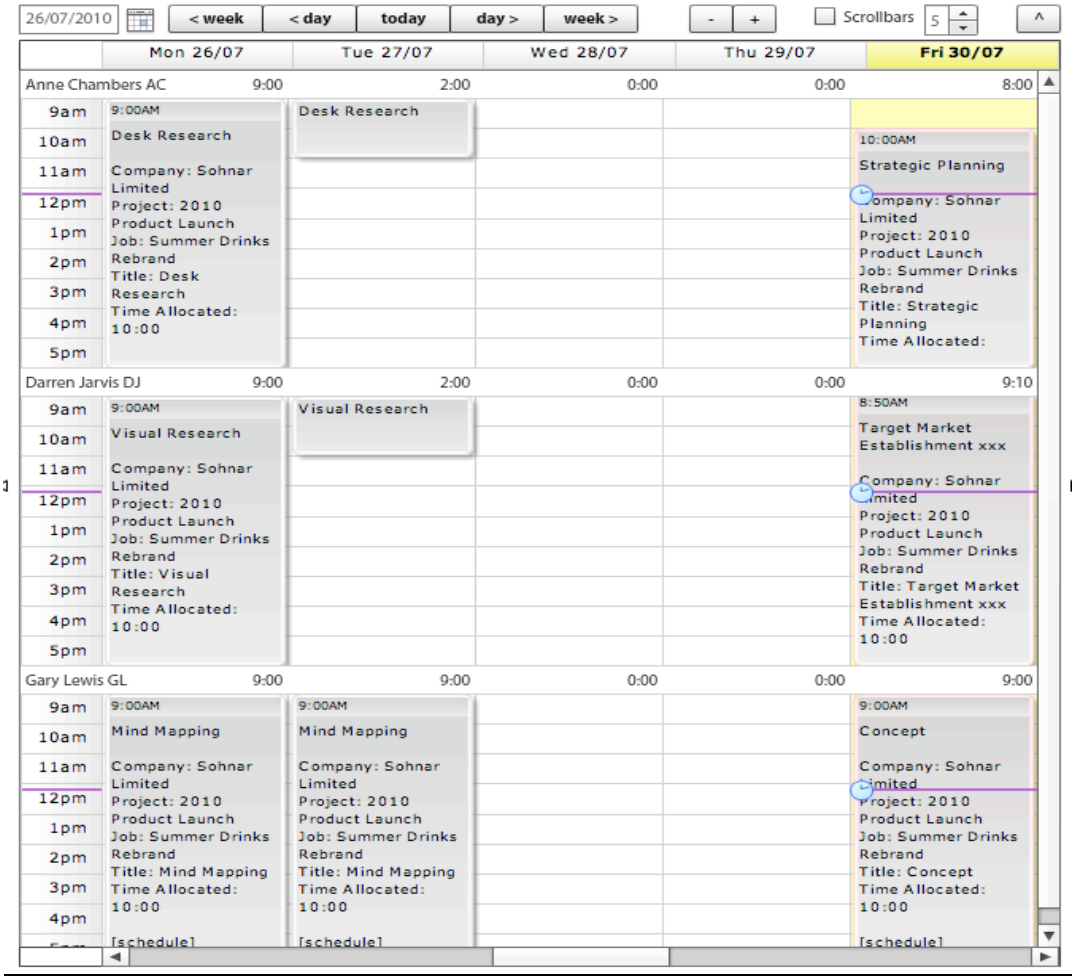
You can use these drop down boxes to change the results shown in the list.

Showing Scheduled work only
You can simply alter “false” to “true” in the filter shown above, and the displayed list will refresh to show scheduled work only.

Additional filters can be added if required. You may for example wish to search for specific jobs or stage names. To add another filter click the button on the far right button underneath the “columns” header, and then select a new filter term and search option as required from the three available function boxes. Adding more filters will mean more search terms are applied to any existing filter. To remove any filter, use the function buttons on the far right of the search to remove that line.

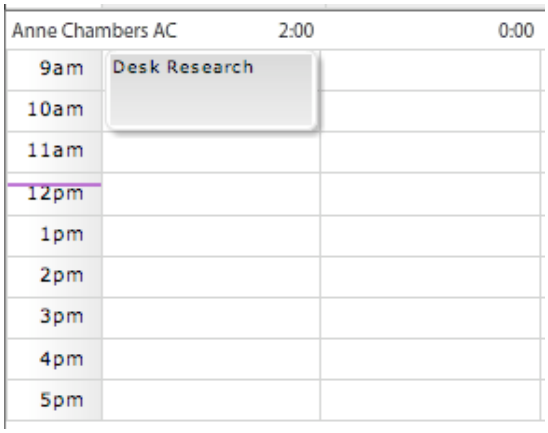
Seeing and Moving Scheduled Work

When you have scheduled work in Traffic to your staff members, the central calendar will display the stages and tasks as blocks on each person's calendar. The example below shows three selected staff member's calendars with work assigned to them:

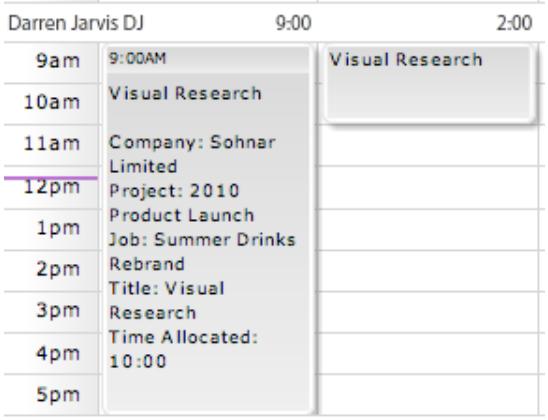


Work is displayed on each person's calendar to run from 9.00am to 6.0 pm by default. Any stage or task that lasts longer than one working day will also block out the following days on that person's calendar until the full allotted time period has been covered:

Example 1: Anne has been assigned a stage lasting 2 hours. This blocks out 2 hours of Monday, starting from 9am.



Example 2: Darren has been assigned a stage lasting for 10 hours. This blocks out 8 hours of Monday and 2 hours of the following day, again starting at 9am



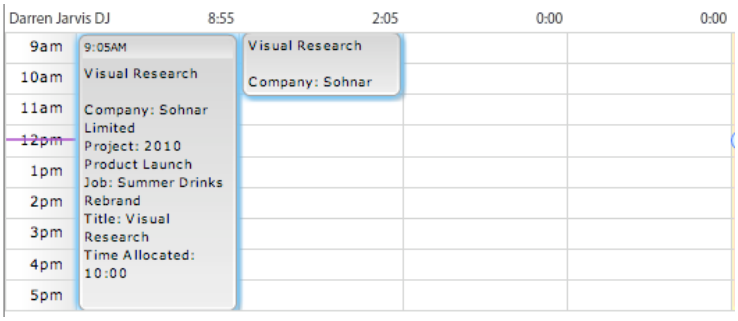
<u>Moving Stages</u>

To move any stage to a different day or time in a member of staff's calendar, simple click in central area of stage (cursor will change to a cross-hair) and hold that stage and move it from left to right across the days, or up and down to move to a different time slot within the same day. If the stage spreads over more than one day, all blocked out panels will move at the same time, whichever day you click on to drag the stage.

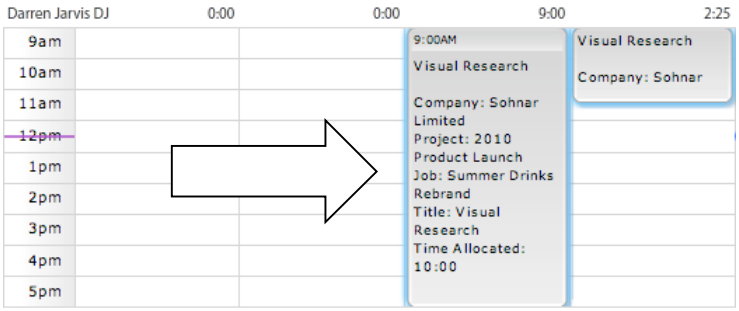
Example 1: Stage is originally planned to start Monday but needs t be moved to start on Wednesday.

In this example we moved the stage forwards by 2 day by dragging the Monday portion of the stage onto Wednesday. The whole stage was moved to cover the same duration of time, and it now ends on Thursday morning.

Before dragging stage:



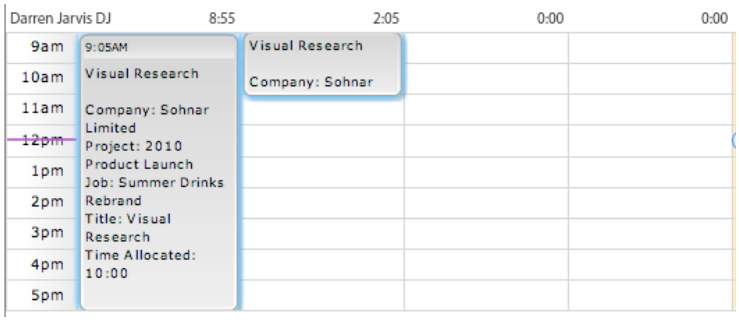
After dragging stage



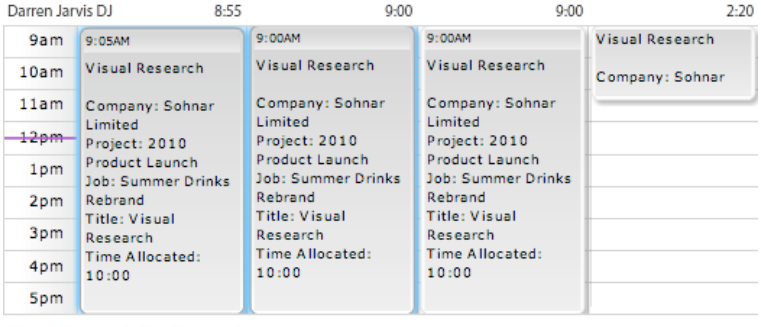
<u>Increasing or Decreasing Stage length</u>
To increase or decrease the time allowed on the calendar to work on a stage, hold down your **'SHIFT"** key while dragging the stage.

Example 2: In this example we want to keep the stage starting on Monday, but extend the time allowed so that the deadline changes to Thursday.

Before dragging stage with "shift" held down



After dragging stage with "shift" held down. Stage has been extended, and start date has remained in same place.

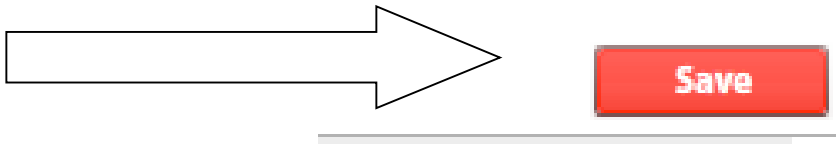


You can also increase or decrease the length of a stage by clicking at the upper or lower edge of the stage border (cursor will change to a double headed arrow), and drag the border of the stage higher or lower so that it decreases in duration within the same day

NOTE: After making changes to the calendar, you MUST PRES THE RED SAVE BUTTON.

The save button is at the bottom right hand corner of the Multi calendar window. It turns RED when there are unsaved changes on the screen. Pressing the save button is required to send the updated changes to your Traffic system.

SAVE OFTEN!!



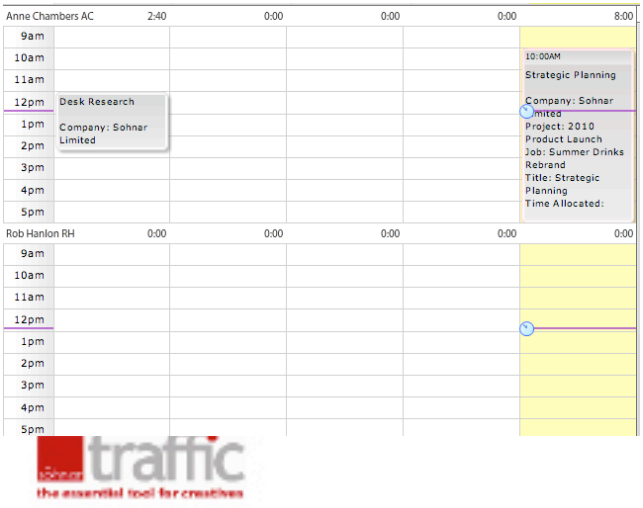
If you quit the Multi Calendar screen or refresh it without saving, your changes will be lost if they have not been saved.

<u>Moving work between staff members</u>

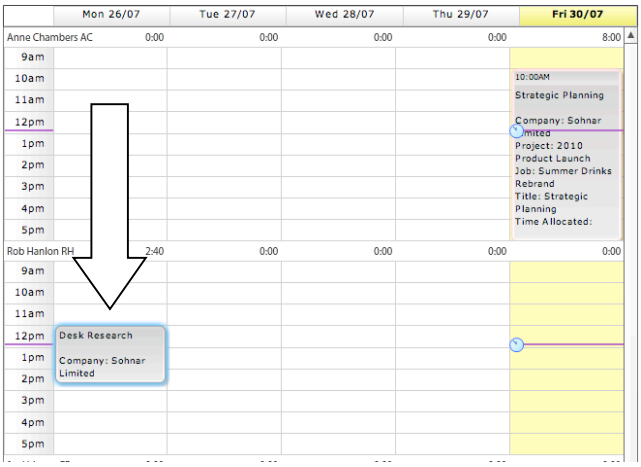
If you wish to move scheduled work from one person to another, click on any scheduled work on the calendar and hold down the **CTRL** key on a PC or the **APPLE** key on a Mac. With this key held down, you can drag the scheduled stage over the border of one person's calendar and onto another person.

Example 3: Stage on Monday needs to be taken away from Anne and allocated to Rob

Stage before clicking with CTRL/Apple key held down



Stage after moving with Ctrl/Apple key held down. Once it is on Rob's calendar you can move to any required position for him in the ways described earlier, without needing to keep the Ctrl/Apple key held down any longer.



Scheduling work by using the Stage/Task List

You can also choose to assign work from the right hand side list of stages and tasks. By clicking once on any stage in the list, that item will become highlighted. You can then drag this selected stage onto any staff members calendar on the centre of the screen and drop it. You can then adjust the position and duration of the stage after it has been placed on the calendar in the ways described above.

If you have the list set to show **unscheduled work**, then by dragging it onto the calendar view you will be assigning it to a member of staff. Therefore once the stage has been dropped onto the calendar it will disappear from the list view on the right. Using this method you could effectively assign all unscheduled work until there is nothing left in the list.

If you have the list set to she **scheduled work,** you will be swapping the scheduled worker from one person to another. You will see the initials of the person displayed in the "Employee" column change to the new person as soon as you drop the stage onto that new persons calendar. The stage will also be removed from the original persons calendar at the same time.

Again, remember to click the red "SAVE " button when you have finished scheduling.

Additional functions

At the very bottom of the Multi Calendar window are two further function buttons:

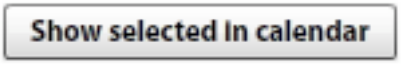
De-schedule

You'll find the "De-Schedule" button at the very bottom left corner of the Multi Calendar screen. It allows you to un-assign any stage or task in the calendar screen.
To use it, simple click on any stage/task on the calendar view to select it (selected blocks have a highlighting effect around the border to make them stand out), and then click the "de-schedule button. The stage or task will disappear from the calendar view, and appear back on the list of unscheduled work shown on the right.

Another way to de-schedule work is to click on the start of the scheduled work panel with Apple or Ctrl held down, and move it entirely off the calendar and onto the list of work shown on the right hand side of the screen. Once you let go of the panel on the list area, it will become de-scheduled and removed from that persons calendar.

NOTE: Work that has been rescheduled (either moved from the list or one person's calendar to a new person) must be SAVED before it can be de-scheduled again.

Show Selected on Calendar



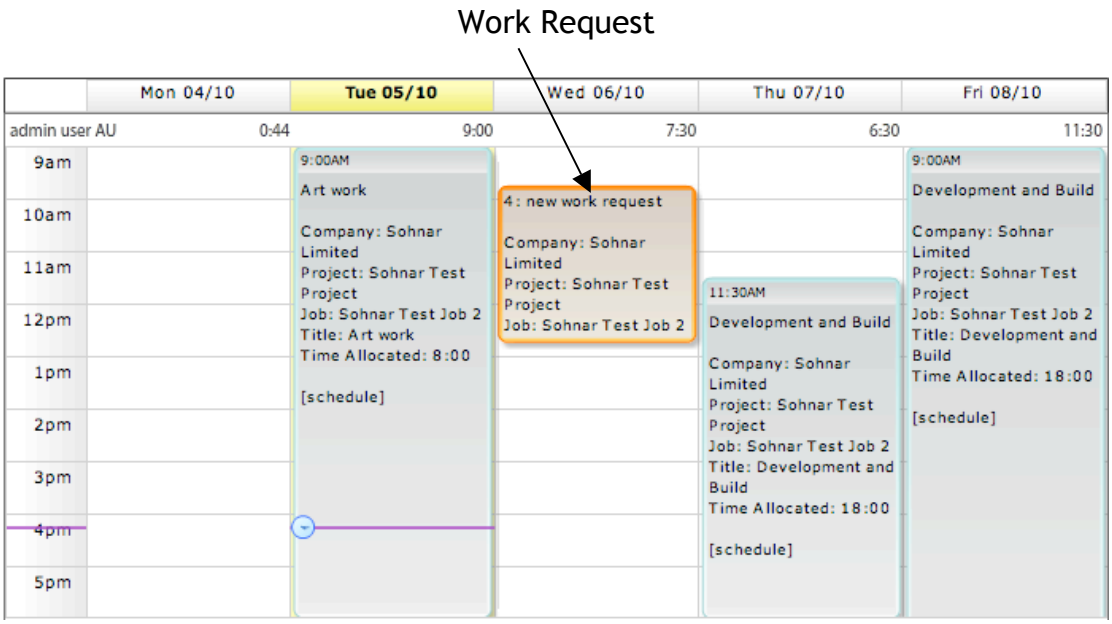
You'll find this button on the very bottom right corner of the screen, underneath the Stages/Tasks list. It allows you to quickly locate a stage on the calendar.

To use it, select a stage/task in the list by clicking on it (colour of stage in list will change to green). Next, click on the "Show selected in Calendar" button. The calendar will display the week to view that scheduled item on screen. If the selected stage belongs to a user who's calendar is not currently visible on the calendar screen, then that person's calendar will be added to the calendar view and the stage /task displayed.

Work Requests

If you use Work Requests in Traffic, these will show on the Multi Calendar along with other scheduled work.

Work Requests appear with a red border around them.



Work Requests can be moved to a different time slot using Multi Calendar, in the same way as other scheduled stages and tasks. The only restrictions are that they cannot be transferred between staff members, and they cannot be de-scheduled.

Remember to press SAVE after moving work around on Multi Calendar!

In this way you could schedule Work Requests in Traffic and then work out how best to fit them between other scheduled stages and tasks.

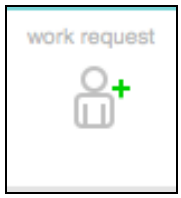
Please note that Multi Calendar does not show diary appointments.

WORK REQUESTS

Traffic contains a Work Requests system whereby users can submit requests for other users, asking them to carry out specific tasks related to jobs and projects. Work requests are received in the Diary area, as well as in AIRTIME (if you are using this feature), and each request is accompanied by an alert. Recipients can acknowledge, accept or decline every request, and the sender can be sent a confirmation of this, as well as overlook all current work requests in one central area. This section will look at sending, receiving and viewing work requests. The use of requests in AIRTIME will be discussed in the section on AIRTIME.

Sending a Work Request

To send a work request to another Traffic user, click on the work requests "plus" button. This icon appears at the top of the screen when you are in the Diary, Projects, Jobs, Orders or Traffic sections.



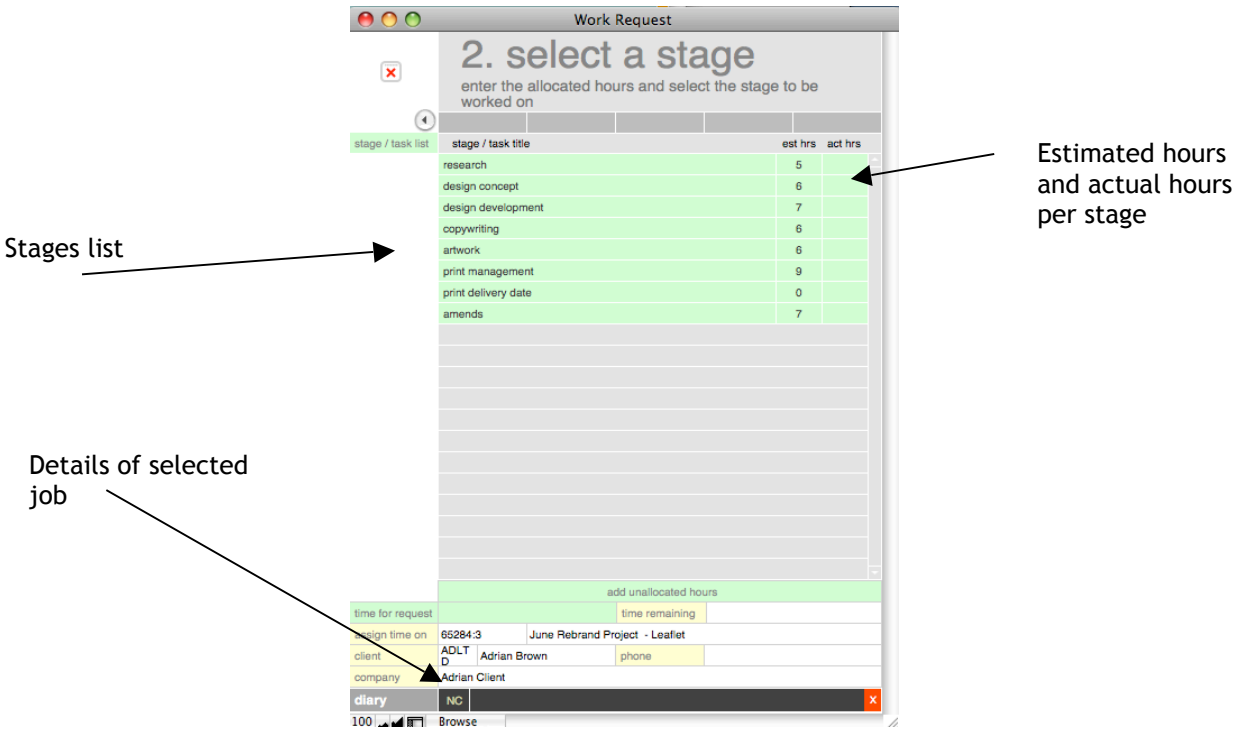
Clicking the icon will open up the work request window:

Work Request
1. select a job
select the job for your request
jobs list
current jobs
my job li
65284:3 june rebrand project - leaflet adltd
65284:2 june rebrand project - poster adltd
65284:1 june rebrand project - brochure adltd
65283:1 a freelancer did it oakl
65282:2 amends oakl
65282:1 we use couriers oakl
65281:1 courier for abroad free
65280:1 charging for couriers adltd
65279:1 sunsplash website oakl
65278:1 testing bill set amount oakl
65277:1 magazine adverts ryan
Options for filtering searc
Jobs search function
ob list
roject name/job name/client code)

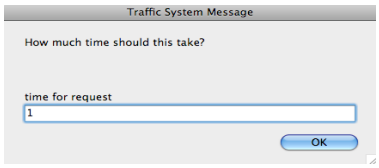
You can use the “current jobs” or “my jobs” radio buttons to refine the search (“my jobs” will list jobs that you are in the team for, “current jobs” will list all active jobs). If you want to search for a specific job, use the quick find window above the list of jobs to search by job name, client name, or project number.

Choose the relevant job for the work request, and click on the job title line to move to the next step. Work requests can only be issued for jobs that already exist in Traffic.

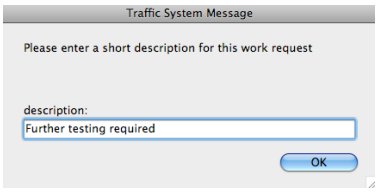
In the next window, choose which stage your work request is for. Against each stage title you will see details of how many hours were estimated for the stage, and also how many actual hours have been logged so far.



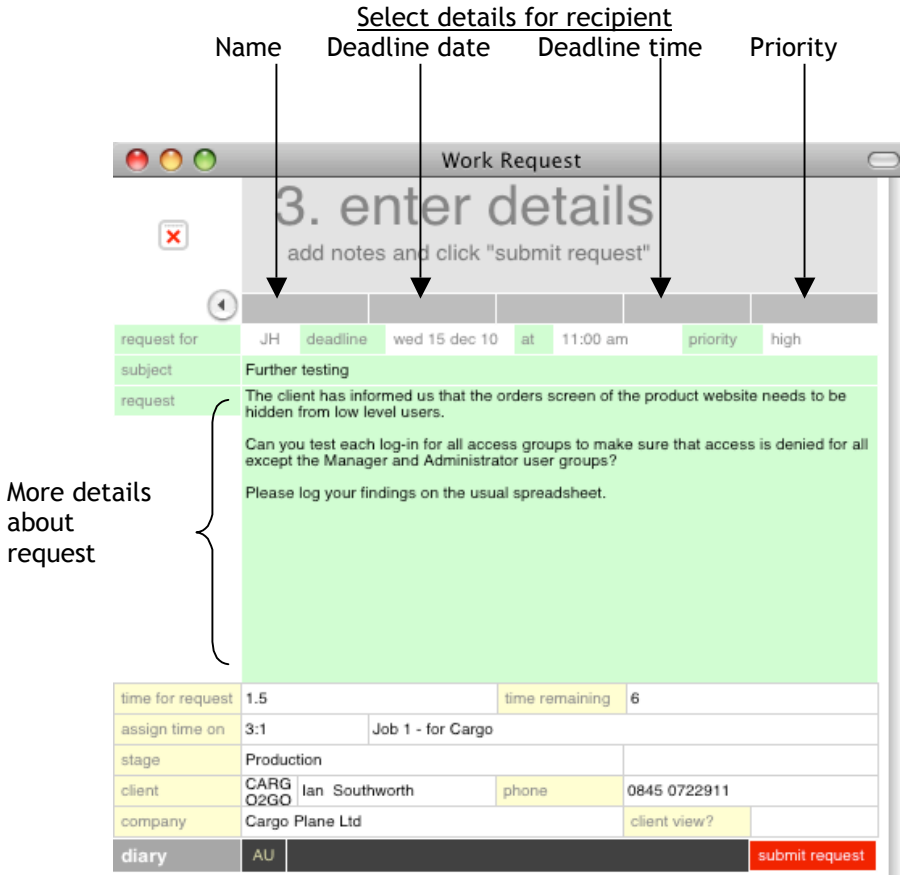
Click on the stage name.
You will now be asked to fill in how much time you wish the recipient to spend doing the work. Remember that work requests can be very specific. You don’t have to allow the full estimated time of the stage if your request is for just a small part of it.



You will then be asked to fill in a description or subject for the request.

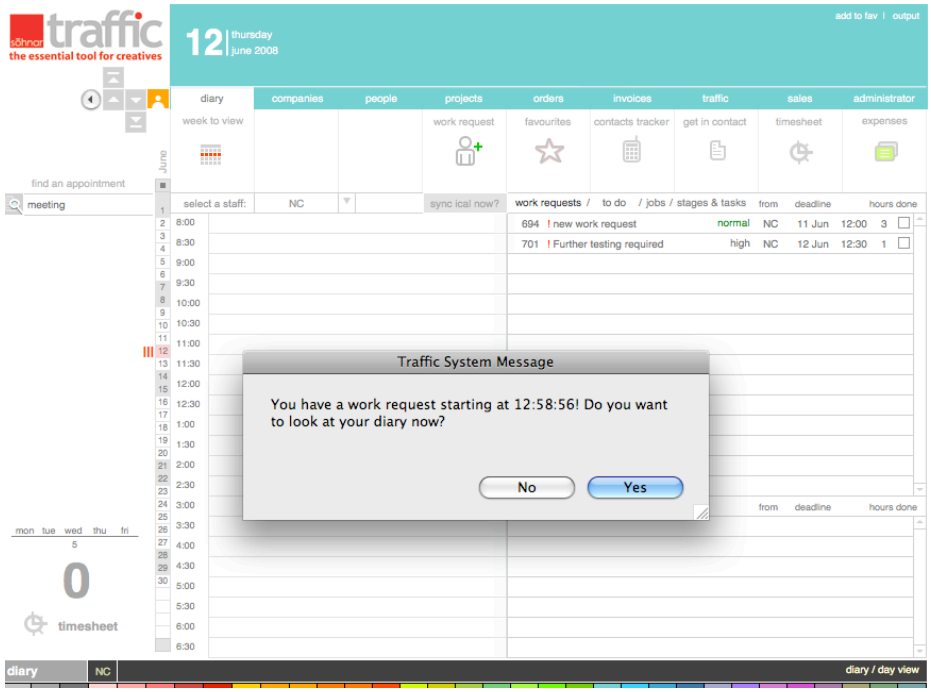


After completing in your description, you will next see the final window where you can add more text, or give detailed instructions for the work involved. You must also select which staff member is going to receive the request. At the top of the screen are four fields that need to be filled in (all have drop down menus). Here you will select the name of the recipient, the date and time that the request needs to be completed by, and a level of priority.

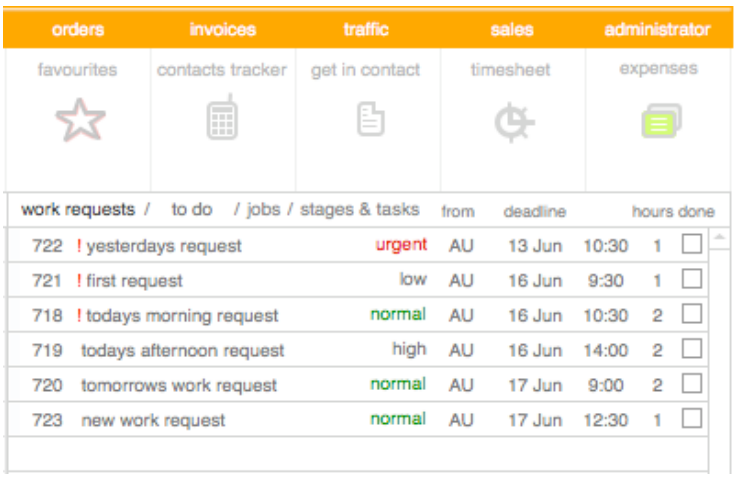


Once all the fields are completed, click the red button marked “submit request” to issue the work request.

The recipient will receive notification that they have received it in two ways. The work request will appear in their traffic diary, and they will receive a pop-up reminder a few minutes after the request is issued (not just before the deadline time).

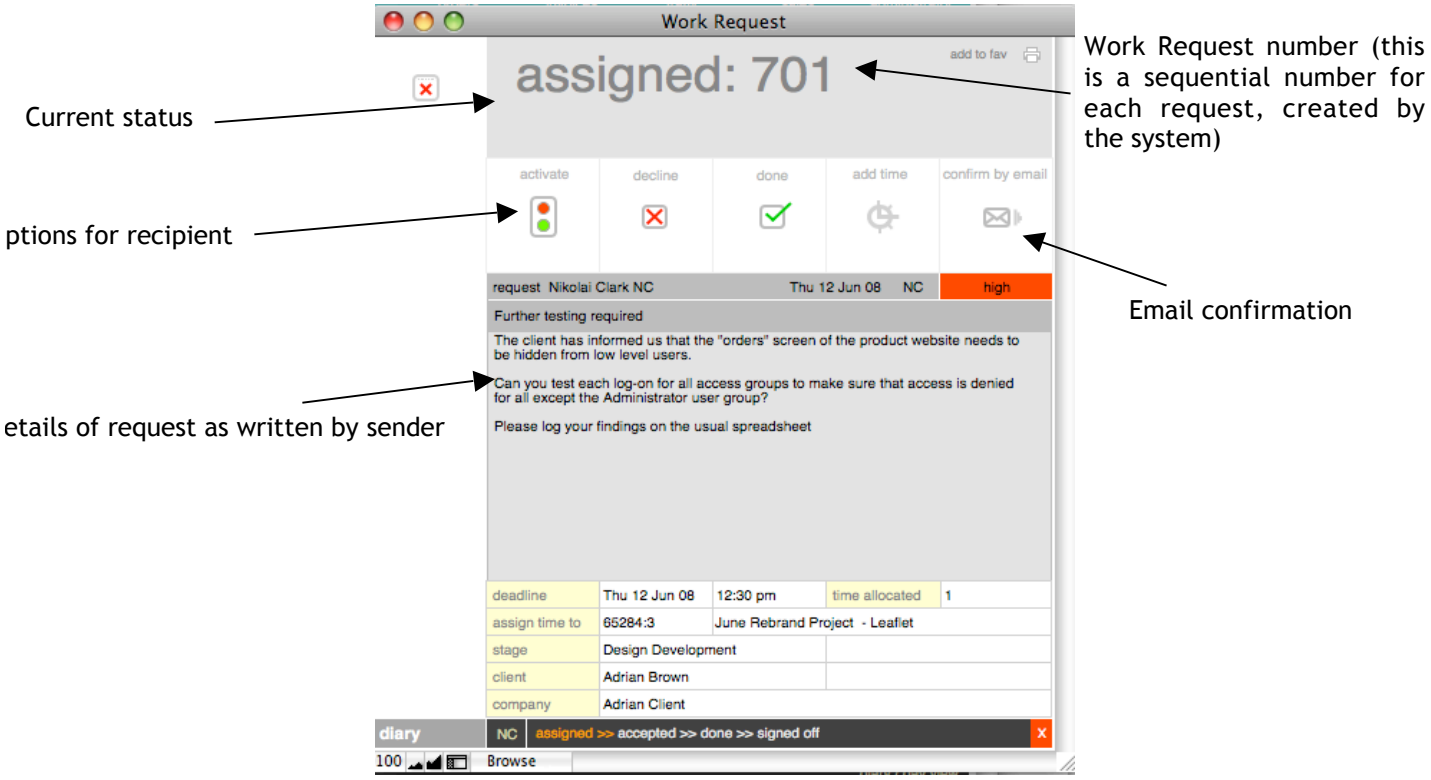


Work requests appear in the diary area on the right hand side of the screen, under the tab called “work requests”. They appear in order of priority, i.e. nearest deadline date first. Overdue requests have a red “!“ beside them.


orders
invoices
traffic
sales
administrator
favourites
contacts tracker
get in contact
timesheet
expenses
work requests / to do / jobs / stages & tasks
from
deadline
hours done
722 ! yesterdays request urgent AU 13 Jun 10:30 1
721 ! first request low AU 16 Jun 9:30 1
718 ! todays morning request normal AU 16 Jun 10:30 2
719 todays afternoon request high AU 16 Jun 14:00 2
720 tomorrows work request normal AU 17 Jun 9:00 2
723 new work request normal AU 17 Jun 12:30 1

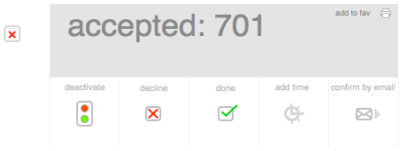
Actioning a Work Request

When you click on a work request in your diary, it will open up in a new window and you have a number of options available to you. The open work request window will look like this:

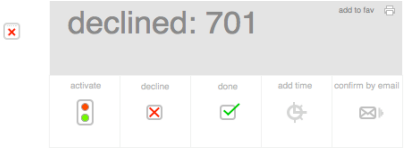


You can now do a number of things.

Accept the work request by clicking on the 'activate" traffic light icon. This will change the status to "accepted".



Decline the work request by clicking the "decline" button. If you decline a request, a pop up text box will appear and you must type in a reason why before you can close the window.



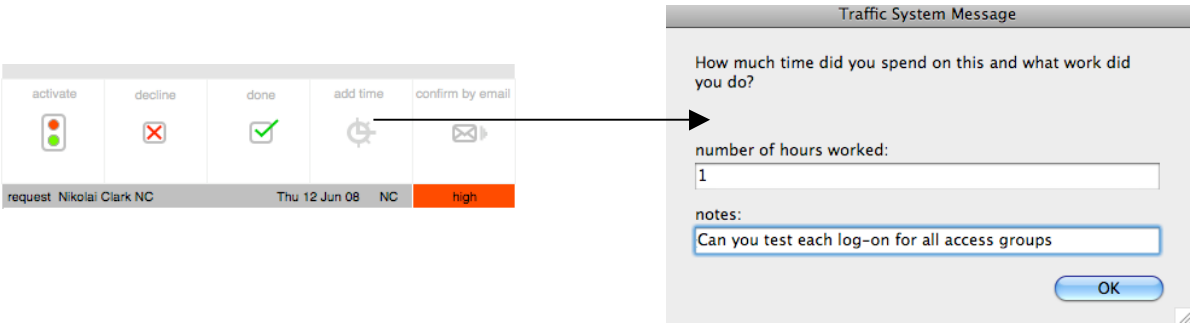
The work request window has a "confirm by email" function, which you can use to send an update of the status to the person who sent it to you. If you click on the icon, an email will be sent automatically and you do not have to write anything. The email will simply contain the work request number and title, current status and your initials.

Note: Traffic has an optional setting that makes the issuing of these confirmations automatic, so an accompanying email is sent out to the recipient when the work request is sent, plus an email is sent to the sender every time the status is changed. For more information on this, refer to the section on "Administrator"

There are two more things you might do after accepting a work request:

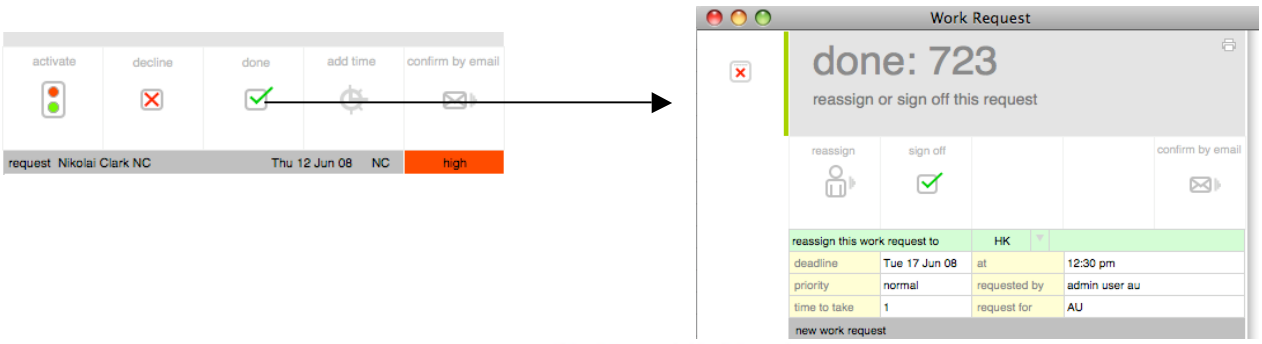
Log time against the job.

You can use the "add time" icon to create a timesheet entry for the work you have done. Click on the icon and a window will come up for you to record the amount of time spent and a notes field. Both fields will be already filled in with the original details sent to you, but you can over-ride these if required. For more details on timesheets, refer to the separate section in this manual



Mark as Done

When you have finished the work request, you can mark it as "done" Doing this takes it off your list of outstanding requests. "Done" work requests can still be seen at the bottom of the diary screen. Marking a request as done also counts as a status change, so you may wish to open the done request and send an email to the sender. The request will look slightly different after it has been marked as "done".



Depending on your level of access to Traffic, you may now be able to click an icon called “sign off”. This will completely delete the work request from the diary. A signed off work request can only be retrieved by Traffic users with a high level of access. For this reason there is a setting in the Administrator area that can be set to limit use of the “sign off” function to high level users.

Notification for the sender

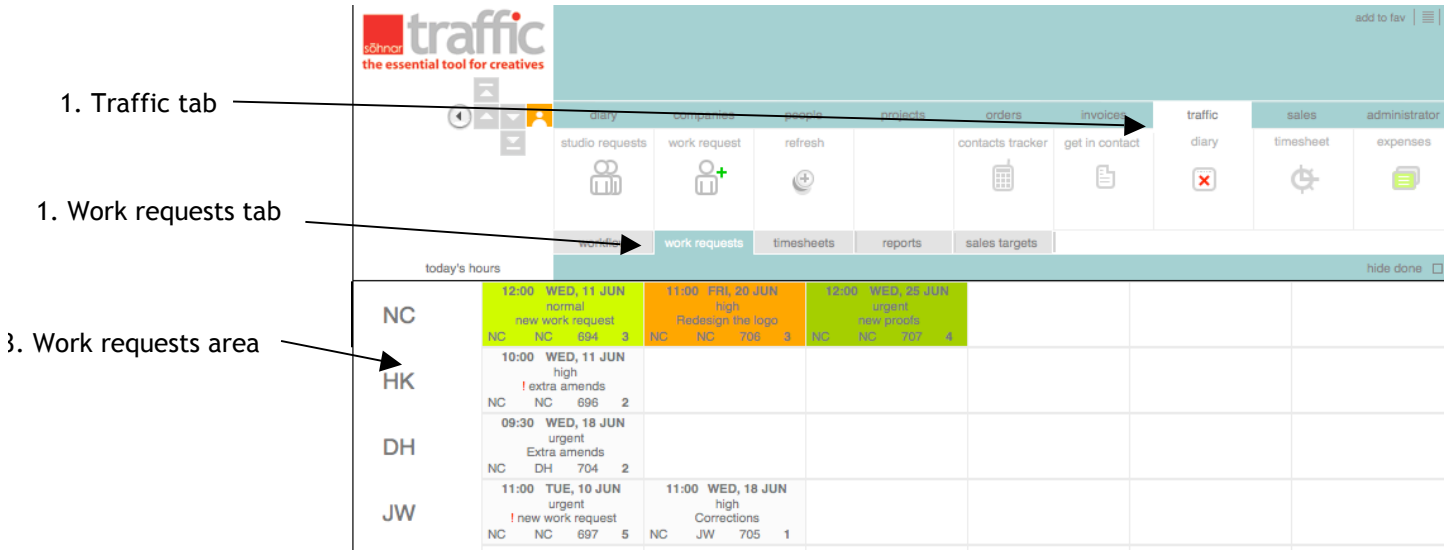
If you are the sender of a work request, there are ways that you will find out whether your work requests have been actioned or not.

1. Email confirmation – any status: As mentioned above, the recipient can send you a confirmation email to say whether they are doing the request, by clicking on the “send email” icon.
2. Email confirmation (automatic): If work request emails are set to automatic in Administrator, the sender will be notified of every status change as soon as the recipient changes the status.
3. Diary confirmation – declined: In the case of a work request being declined, the person who sent the request will receive back a copy of it under the “work request” section of their own diary. From here, you can open it and read the reason given for declining it.
4. Diary confirmation – done: Similarly, if a work request is marked as “done”, a copy of it will also appear in the sender’s diary area (under “done work requests”.

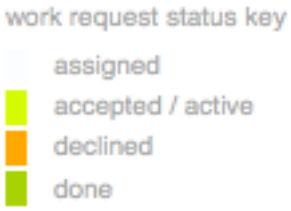
These are some of the ways that you can see how staff are responding to work requests that you have issued, but to see all work requests in the system, re-assign declined requests or sign off completed ones, you need to go to the main Work Requests area.

Managing Work Requests

Under the “traffic” tab is a screen where all issued work requests can be managed. This area is for studio managers to see what requests have been sent out and to whom, and to re-assign or sign off if required. To find this area, you need to go to the main tab called “traffic”, and then click on the tab called “work requests”.



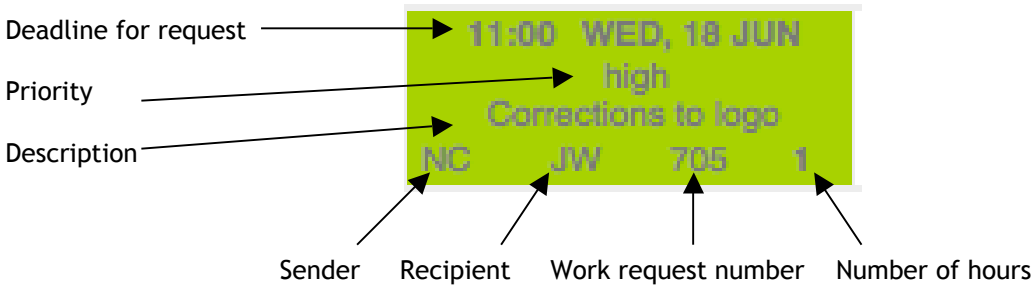
The table in the main area of this screen show you all the issued work requests throughout all the staff. They are colour coded to tell you the status:



White – staff member has not activated (accepted) work request yet.
Yellow – request has been accepted
Orange – request has been declined
Green – request has been marked as done

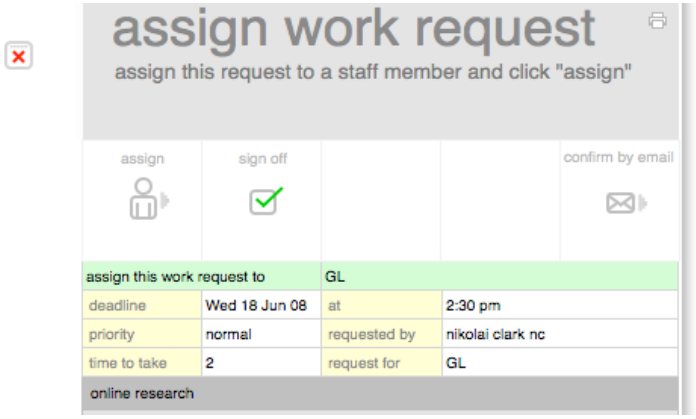
(signed-off work requests do not appear on the table)

Each panel in the table shows a summary of the request.



As well as viewing all issued requests, users with access to the work requests area can also re-assign them.

To re-assign a request, click on the request in the table view. In this view you can choose a new staff member's initials in the field marked "assign this work request to" (in our example below it is staff member GL)



Once you have chosen a new name, click the large "assign" icon at the top of the window and the request will be transferred to the new staff member. It will appear in the new person's diary, and the status will be re-set to not yet activated.

Filtering staff names on the screen

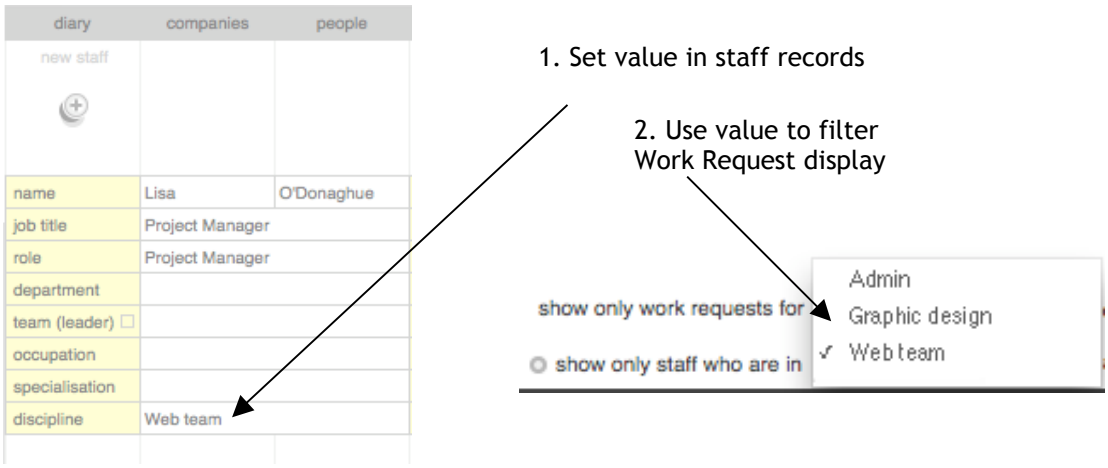
The way the work requests table shows requests can be changed. At the bottom of the main screen are options to change the display:

To show work requests for just one client, select a client name in this field. To clear and show all client requests, click the radio button called "show all clients work requests".

If the table is full of information, there is a button at the lower right corner of the central area called "see next 6". The area displays up to 18 active work requests, so you can view a further two screens to see more requests. Remember that signing off a request removes it from this display, so if you

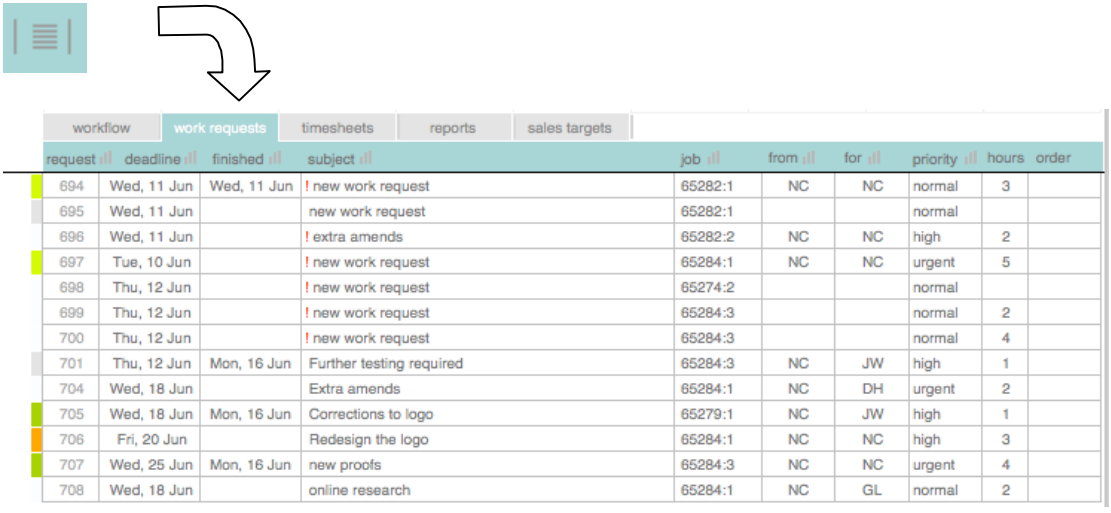
use this area a lot, you should remember to use the sign-off function to clear entries.

To show staff members who work in certain teams/areas/disciplines only, select a value from the drop down beside the “show only staff who work in” option, and click the radio button beside the message.



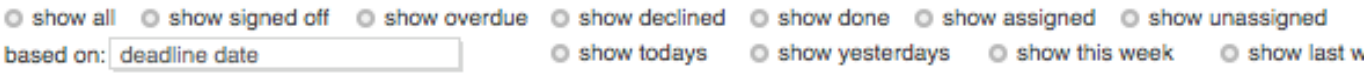
The terms that you will see in this drop down can be set in the Administration area of Traffic. Under each staff record is a field called “discipline”. Use this to group members of staff into work disciplines, departments or teams. You can then view selected results in the work requests area.

You can also show all the work requests in list view by clicking the “list” icon at the very top right hand corner of the Traffic screen:



request	deadline	finished	subject	job	from	for	priority	hours	order
694	Wed, 11 Jun	Wed, 11 Jun	! new work request	65282:1	NC	NC	normal	3	
695	Wed, 11 Jun		new work request	65282:1			normal		
696	Wed, 11 Jun		! extra amends	65282:2	NC	NC	high	2	
697	Tue, 10 Jun		! new work request	65284:1	NC	NC	urgent	5	
698	Thu, 12 Jun		! new work request	65274:2			normal		
699	Thu, 12 Jun		! new work request	65284:3			normal	2	
700	Thu, 12 Jun		! new work request	65284:3			normal	4	
701	Thu, 12 Jun	Mon, 16 Jun	Further testing required	65284:3	NC	JW	high	1	
704	Wed, 18 Jun		Extra amends	65284:1	NC	DH	urgent	2	
705	Wed, 18 Jun	Mon, 16 Jun	Corrections to logo	65279:1	NC	JW	high	1	
706	Fri, 20 Jun		Redesign the logo	65284:1	NC	NC	high	3	
707	Wed, 25 Jun	Mon, 16 Jun	new proofs	65284:3	NC	NC	urgent	4	
708	Wed, 18 Jun		online research	65284:1	NC	GL	normal	2	

List view is the only way to see signed-off requests, and requests that are not yet assigned. You can also sort and filter this view by status and date, by using options at the bottom of the screen.



Studio Manager option

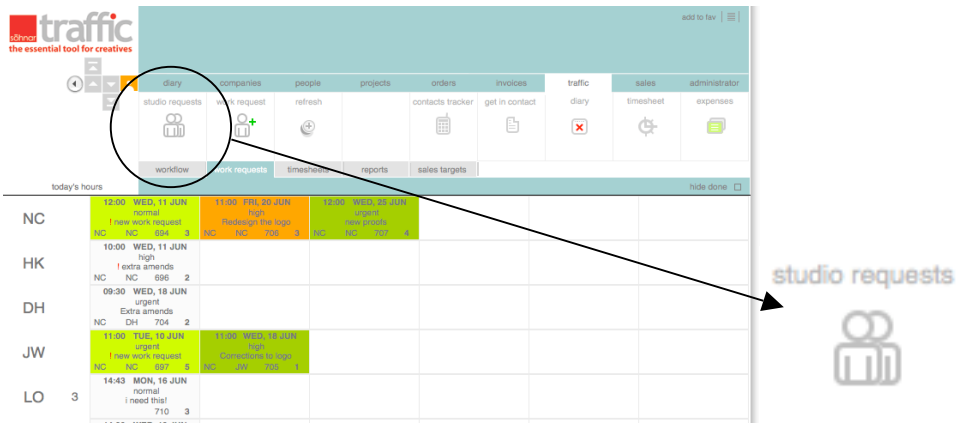
Traffic has a setting that allows a Studio Manager to control the assigning of all Work Requests. The details of issuing requests listed above are based on using Traffic with this option set to “no”. If the option is set as “yes”, the issuing and assigning of work requests will be different.

This setting can be changed in Administrator, under general preferences (see section later on in this manual for more details).

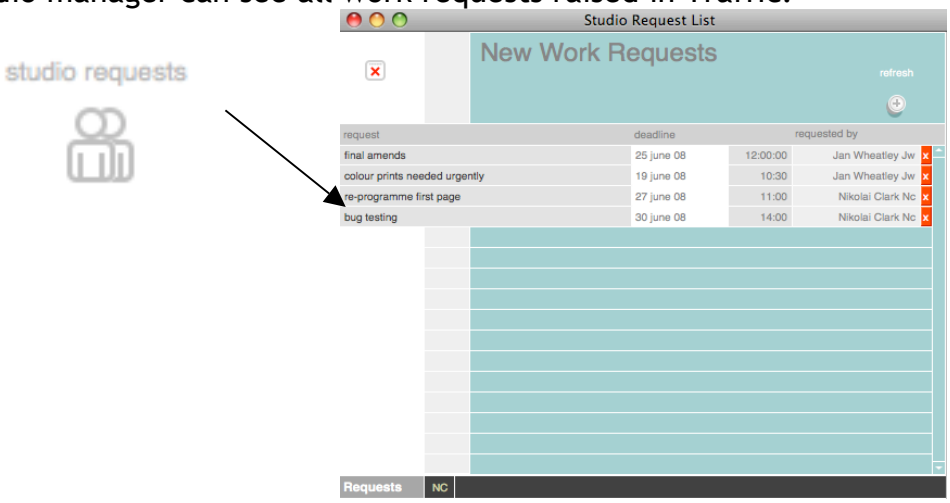
With the Studio manager option set to “yes”, the differences are as follows: Raising a work request is done in the same way but the requests do not go directly to the person chosen when submitted. Instead they go to a special holding area and must be issued from there by the Traffic user acting as studio manager.

A request will only appear in the recipient’s diary area once the studio manager has checked it and authorised it. They may even decide to re-assign the work request to someone other than the originally intended recipient. Once the studio manager has released all raised requests, the rest of the details are the same as those listed above.

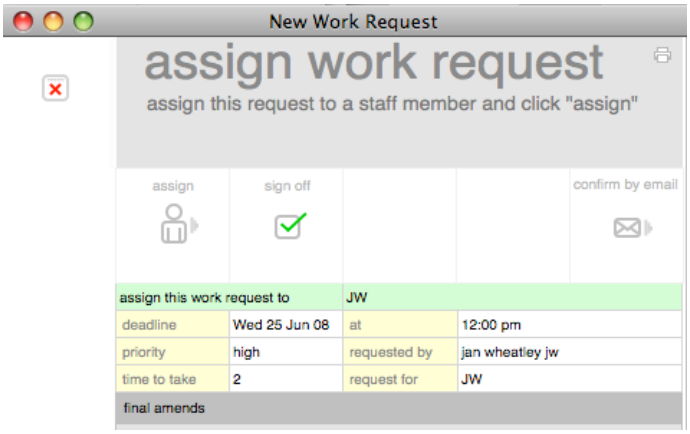
The important thing to remember with Studio Manager option is that no issued work requests will appear in the diary area of any recipients. Clicking on the icon called “studio manager” opens the “holding area” of raised requests. This icon only appears in the main work requests area of Traffic.



Click on this icon and the Studio Manager window will now open. Here the studio manager can see all work requests raised in Traffic.



The window displays all requests in the order they were created. It has a "refresh" button (top right) to update and capture any newly added requests. A request can be opened by clicking on the title line. When opened it will look like this:



From this view, it can now be assigned to a member of staff (see above for details on this). The details can also be changed, such as the description and the estimated time for the work. Once assigned, it will be cleared from the Studio manager window, and will now appear in the recipient's Traffic diary, where it can be actioned in the ways previously described.

There are a few other thing affected by the Studio Manager setting being active, and these are as follows:

Declined work requests do NOT go back to senders diary – they can only be re-assigned from the work request chart area.

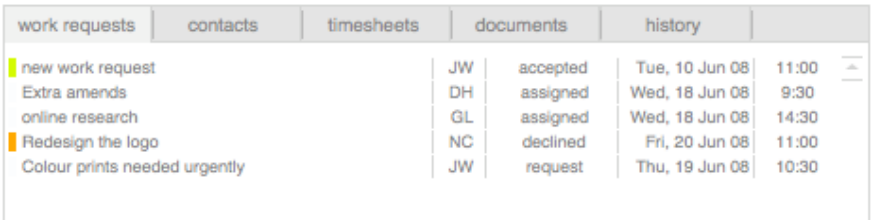
Done work requests do NOT go to senders diary – they can only be re-assigned from the work request chart area.

You will also see under the setting for Studio Manager that it is possible to add a person's initials the function. The effect of doing this is that Declined and Done work requests go to the named studio manager's diary, not that of the original sender. The email confirmations still go to the original sender.

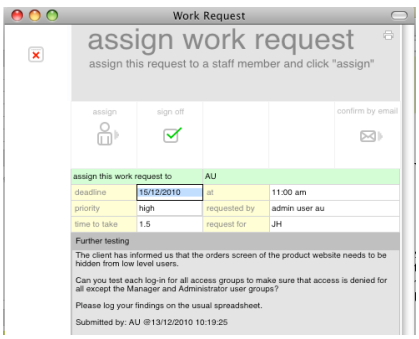
Please note that email notification does NOT go to the assigned Studio Manager to inform them that pending work requests have been created and need assigning. The "studio requests" window can however be kept open all day and checked periodically to make sure all requests are moved forward. This window will auto refresh every time a new request is made, plus it can also be manually refreshed at any time for certainty.

Managing Work Requests from the Project Summary Screen

You can also see and amend work requests from the main project summary screen. All requests will appear in the central panel area, under ther tab labeled "work requests"


work requests
contacts
timesheets
documents
history
new work request JW accepted Tue, 10 Jun 08 11:00
Extra amends DH assigned Wed, 18 Jun 08 9:30
online research GL assigned Wed, 18 Jun 08 14:30
Redesign the logo NC declined Fri, 20 Jun 08 11:00
Colour prints needed urgently JW request Thu, 19 Jun 08 10:30

Click on any request to open it in a separate window. In here you have the same ability to manage the request as you have in the Traffic tab – you can re-assign it to another person, or change any of the date, time, duration or detail.


Work Request
assign work request
assign this request to a staff member and click "assign"
assign this work request to AU
deadline 15/12/2010 at 11:00 am
priority high requested by admin user au
time to take 1.5 request for JH
Further testing
The client has informed us that the orders screen of the product website needs to be hidden from low level users.
Can you test each log-in for all access groups to make sure that access is denied for all except the Manager and Administrator user groups?
Please log your findings on the usual spreadsheet.
Submitted by: AU @13/12/2010 10:19:25

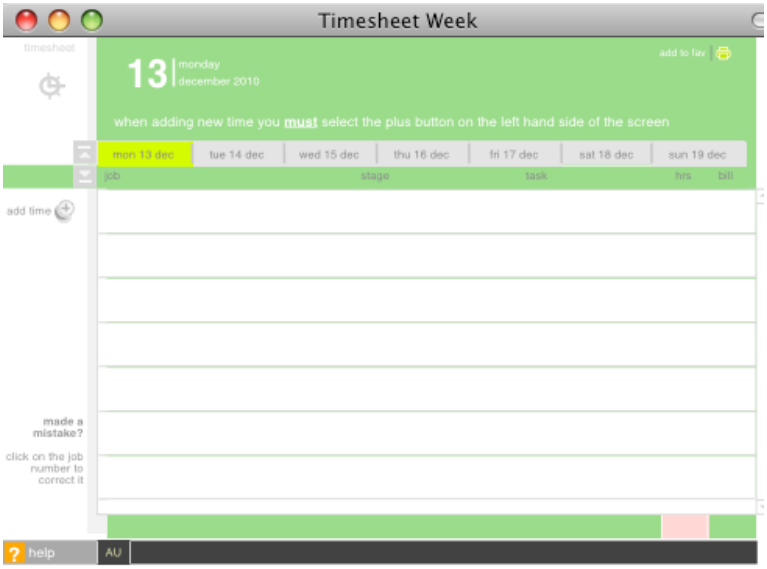
TIMESHEETS

Traffic users can record accurate and detailed timesheets of work carried out in the studio. These timesheets can be viewed in reports, and while monitoring a project. There are several ways of logging time in Traffic, all of them quick and efficient.

Timesheet Week

The Timesheet Week icon appears in nearly every main tab of the Traffic system and looks like this:

Click on this icon to open up the Timesheet window.

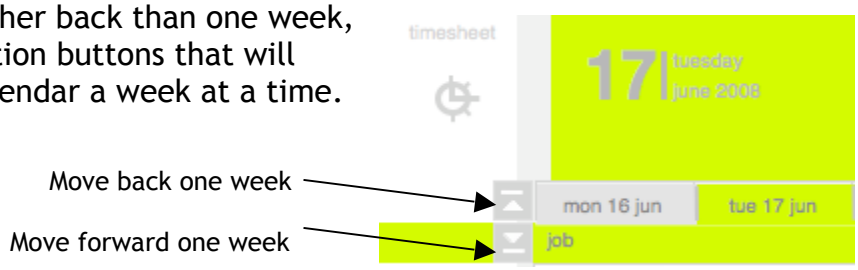


This window allows you to record time against any current job in the system. You can also use it to review your submitted timesheets over previous dates, as well as amend and delete them if required. For this reason it can be thought of as the “master” timesheet, as timesheets submitted via all other methods appear here.

The steps to take to add a new timesheet using this window are as follows:

- Select the date. The timesheet window automatically opens up with the current week displayed and today's date selected. You can add time for a date other than today by using the seven weekday tabs at the top of the screen.

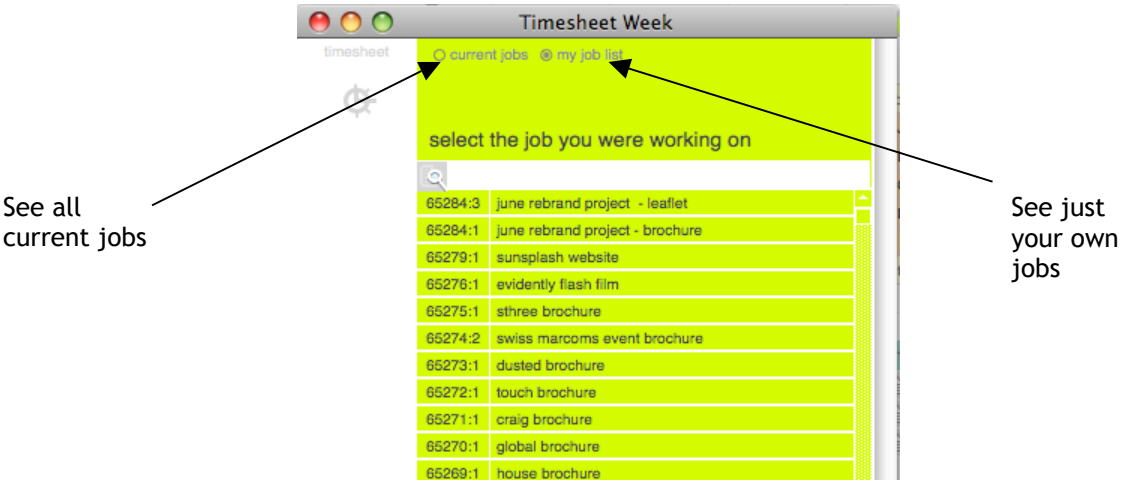
- If you need to go further back than one week, there are two navigation buttons that will move through the calendar a week at a time.



- Once you have selected the correct day, click the plus button labelled "add time" at the left of the window to add a timesheet.

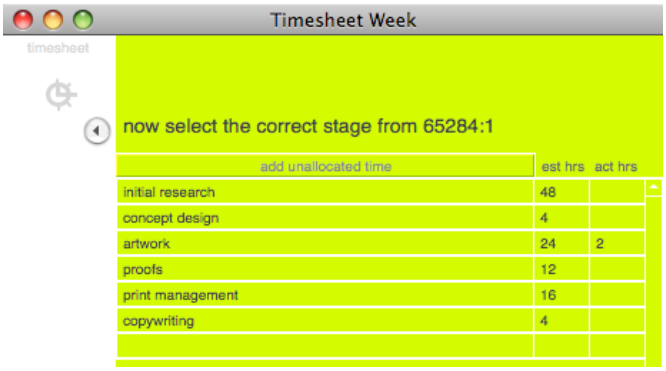
- Clicking this icon will display a list of current jobs.

- You can use the radio buttons at the top of the window to view ALL current jobs, or just jobs that you are in the team for ("my jobs"). Note that jobs that are not current (for example, closed and completed jobs) will not be displayed in either option.



- There is also a quick find window, which you can use to search for jobs by name, number or client.

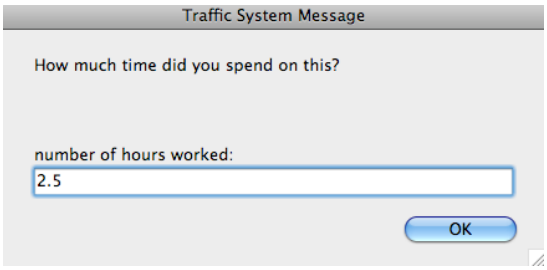
- Once you find the right job, click on it and you will be taken to a window showing the breakdown of stages within that job.



- On the right you will see the amount of estimated hours for each stage, and the amount of actual hours done so far.

- Click on the stage title to continue. You may see a further screen if the stage you worked on was divided up into tasks. In this case, click on the required task name to continue.

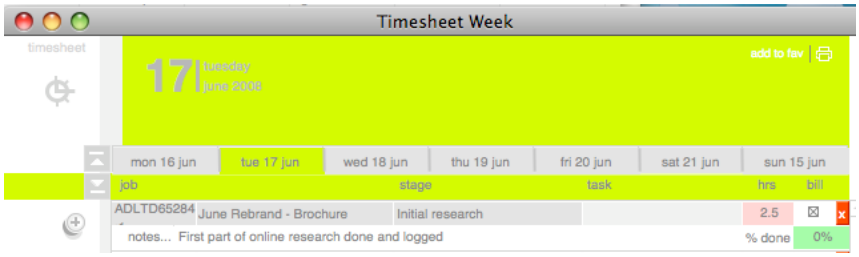
- You will now be asked to enter the amount of time you worked. This must be a numerical value, but it does not have to be a whole number.



In our example we have entered 2.5, which would be two and a half hours. Note that time is added in decimal format.

- Click “OK” and you will be taken back to the timesheet week window, with your hours logged and saved.

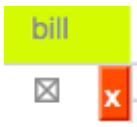
- Now that the line is recorded, you can use the white field below the job details to type any relevant notes.



Note: You do not have to submit or save timesheets when using this method. The information is automatically recorded as soon as you reach this screen. Note that you can still amend the time amount at this stage, and even delete the line entry with the red " X " button on the right if you need to.

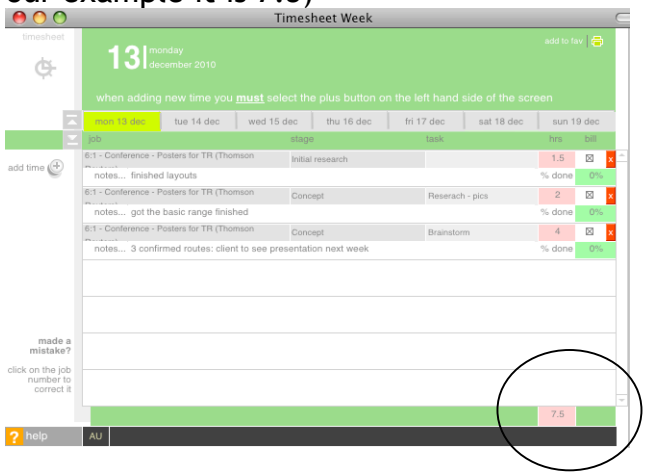
There are two more functions on the right of each line:

Percentage done – Use this to mark how far along the job is from being completed (This is for reference only and does not have any effect on reports).



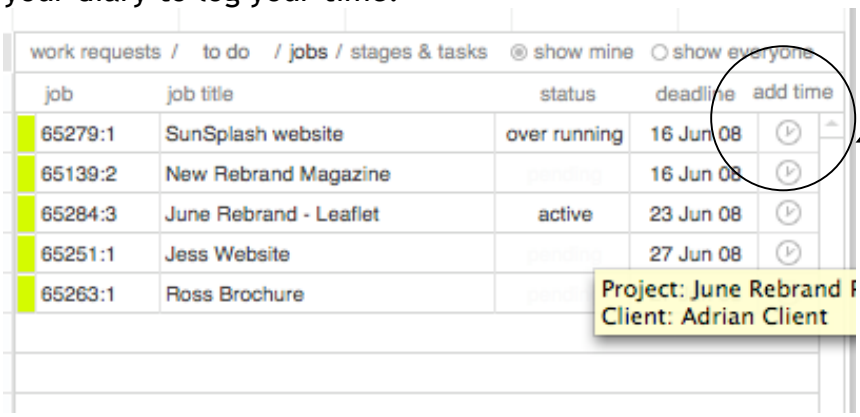
Bill – The hours logged in Traffic default to being billable, but if you uncheck this box, the hours will be recorded as unbillable. They will not show up for invoicing if you are billing to actual hours, and they will have no chargeable value. They will, however, still show as a staff cost.

You can add as many timesheet entries on the same day as you like, even if they are multiple entries for the same job and stage. There is a summary of the submitted time for each day at the bottom right corner of the screen (in our example it is 7.5)



Adding time using Jobs list in the diary

The list of jobs in your Traffic diary also acts as a quick link to the timesheet window. If you have done work on one of your own jobs, you can simply click on the small clock icon on the right of that job line entry in your diary to log your time.

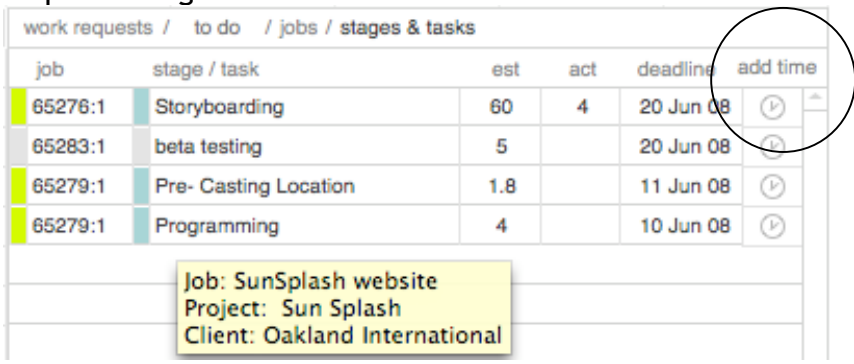


Timesheet link for each job listed

Clicking on the link takes you straight to the breakdown of stages and tasks for that job, from where you can select the correct stage and record a timesheet in the same way as previously described. The advantage of using your diary job list means you don't have to search through the list of jobs as you do with the main timesheet method. It also means you only view jobs that are currently running (the timesheet list of jobs shows all jobs, even if the deadline date has passed).

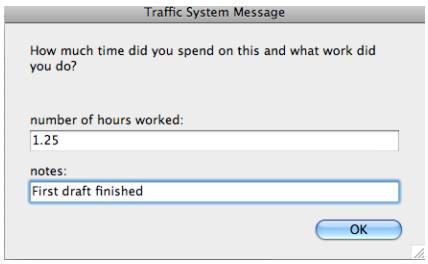
Adding time Stages & Tasks list in the diary

If you have stages and tasks listed in your diary, the link to the Timesheet Week window is even easier. All you need to do is click the clock icon on the required stage or task line.

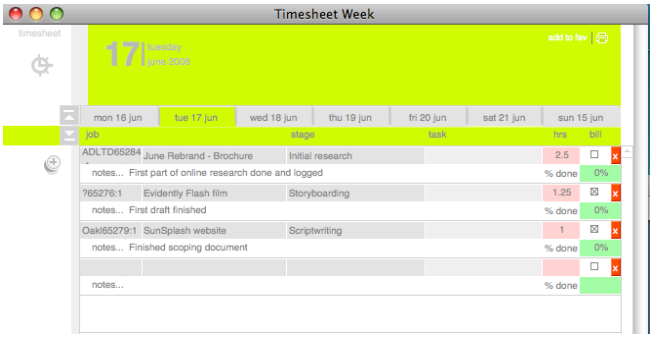


Timesheet link for each stage or task listed

Once you have clicked this icon you only need to type the amount of hours and your notes into a single window to record the time.



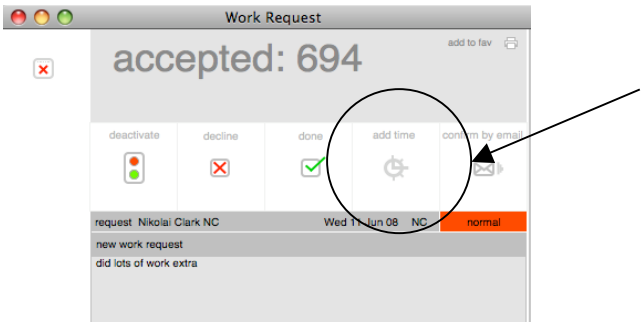
Timesheets added via the links in your Diary are recorded in the Timesheet Week window in the same way. You can open your Timesheet Week window at any time to review or amend time added by any of these three methods.



Please note that Traffic will automatically add hours added via the diary links to the current calendar date (the date you have selected in the diary may NOT be the current date – in which case you will asked if you wish to add time to the selected date or the actual date).

Adding time through a work request

As detailed in the Work Request section of this manual, you can open any request you receive in you diary and use the Timesheet icon to add a new timesheet.

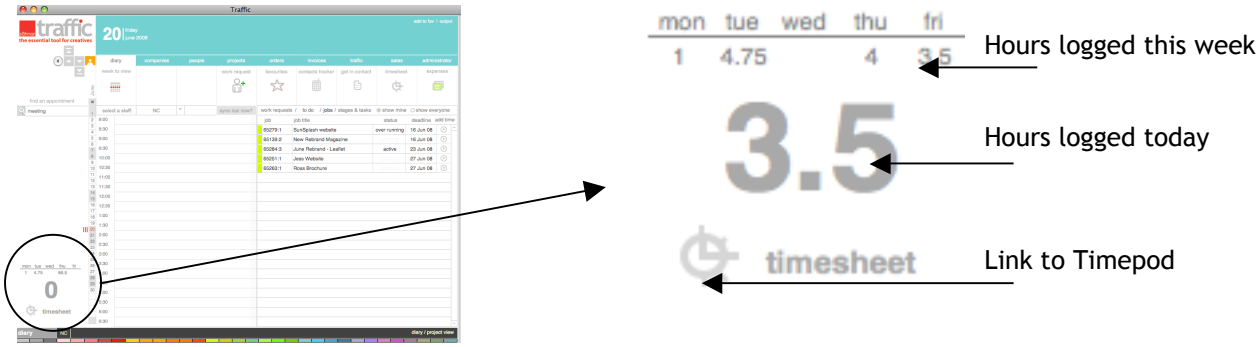


Timesheet link for this work request

Clicking this icon takes you straight to a window where your time and notes can be typed in.

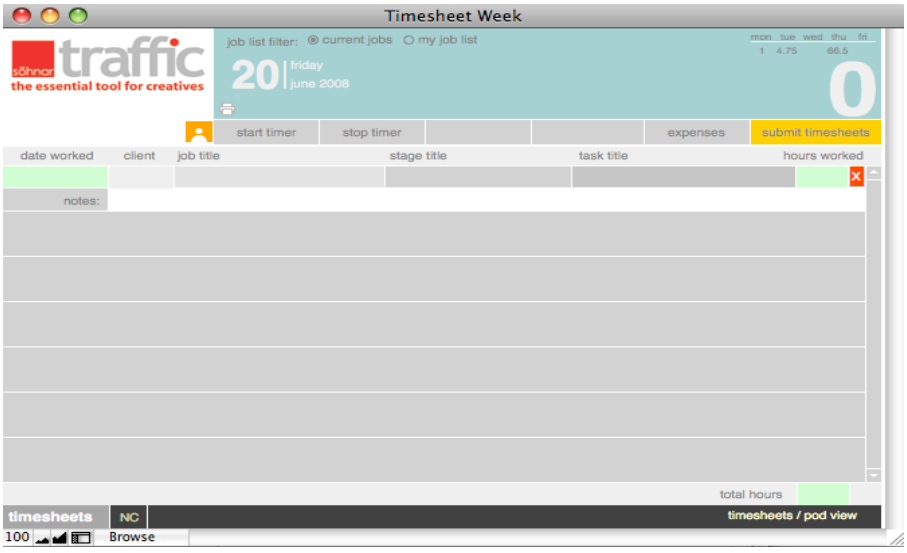
TIMEPOD

Traffic has a module called the Timepod that allows users to add time and expenses to any job. The Timepod can be accessed from the clock icon in the bottom left hand corner of the diary screen.



Note: Beside the Timepod icon is a large figure which shows you your current tally of hours logged. You can also see the tally of hours for each day of the current week.

The Timepod can also be accessed as a stand-alone version of Traffic for users who need no other access to the system except for adding time and expenses. For these users, their log in opens up the Timepod alone rather than the full version of Traffic. The Timepod consists of a single screen which looks like this:



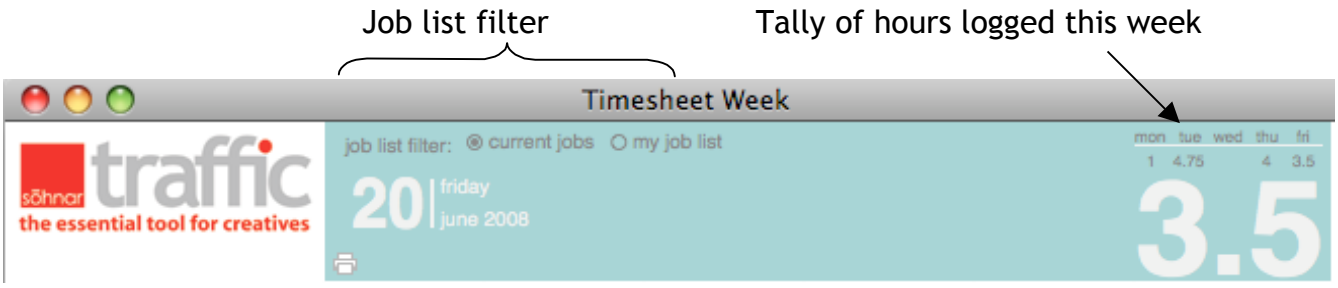
The functions of the Timepod work in the same way for full Traffic users as they do for Timepod only users.

The main function of the Timepod is to add timesheets, and there are two ways to do this.

Adding time manually through the Timepod

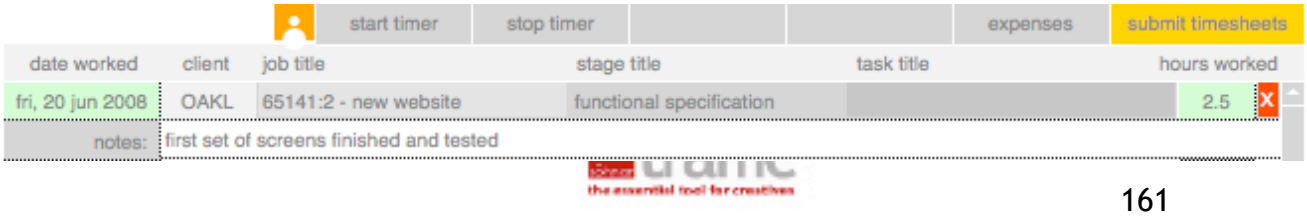
To add time manually, simply click on the first empty window under “date worked” to select the date for the timesheet entry you are making. You can record time on any calendar date, not just today’s date. Once you have selected the date, work from left to right filling in the details of the work you have done. The next window along allows you to select the Client name. All companies currently listed as “clients” will be displayed here, in a drop down list. Select one to continue.

Next choose the “job title” you worked on from the drop down list in the next window. If you wish to filter the list of current jobs, the Timepod has the same filter between “current jobs” and “my jobs” that the normal timesheet week window has. This will limit the display of jobs seen under each client to only jobs that you are in the team for.


Job list filter
Tally of hours logged this week
Timesheet Week
söhnar traffic
the essential tool for creatives
job list filter: current jobs my job list
20 friday june 2008
mon tue wed thu fri
1 4.75 4 3.5
3.5

Once this is set, select the “stage title” for the job that you have worked on in the next field. Next, check to see if there are any tasks in the next drop down. As tasks are not always created for every stage, this field might be empty. If it contains tasks, select the correct one to record your hours against.

Once all these fields are completed, type the amount of hours you worked into the last window. There is a field below the line to add notes into.



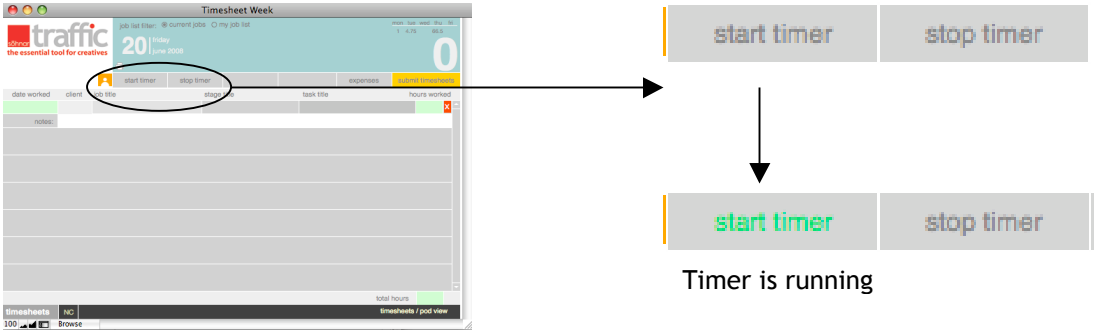
Once a timesheet line has been added you can repeat the process and add more timesheet entries.

Another way of adding time using the Timepod is to use the stopwatch function.

Adding time using the timer

The Timepod allows you to measure exactly how much time you have spent doing something. It has a timer that you can start and stop before entering your hours. The function is used as follows:

Near the top of the Timepod window you will see a “start timer/stop timer” function.



Timer is running

To time yourself, simply click on the “start timer” button to set the clock going. Traffic will begin to record time and you can let the timer run while you work. You will know the timer is actively recording, because the “start timer” button will change colour to green while it is running.

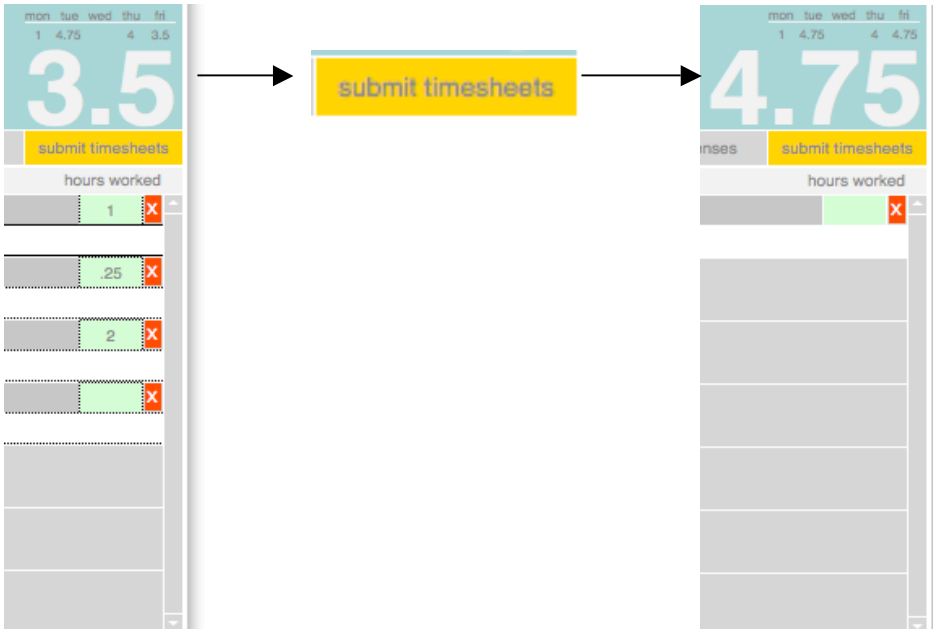
Once you wish to record how long you have been working for, click the “stop timer” button. Traffic will create a new line in the Timepod screen with an exact measurement of how long the timer was running for. You can now fill in the details of the work you did.

Things to remember when using the timer:

- You must start and stop the timer before selecting the client and job.
- You can only stop the timer, not pause and resume, but you can record several line entries for the same job if you need to.
- Using the timer defaults to today’s date for that line entry
- The recorded time can still be edited by overtyping it in the “hours worked” window.

Submitting timesheets with the Timepod.

The Timepod has one important difference to the other ways of adding time in Traffic. With Timepod, your hours will NOT be recorded in the main system until you click the orange “SUBMIT” button. Clicking this button will clear all current timesheet entries from the screen, and record them in the system. It’s also at this point that your daily tally will go up to reflect hours logged.



Note: If you close the Timepod screen before submitting your hours, they will still be there when you log in again.

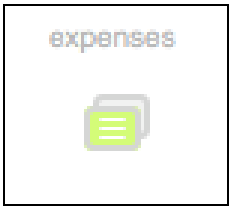
You will notice that the Timepod screen has a log-in icon, this is because it can be a stand-alone Traffic system, so it can be logged into by other users at anytime.

If a full Traffic user logs into a Timepod screen by using the orange icon, Traffic will re-open in full. In the same way, if a Timepod license holder uses the function on another user’s full Traffic screen, Traffic will re-open in Timepod view only.

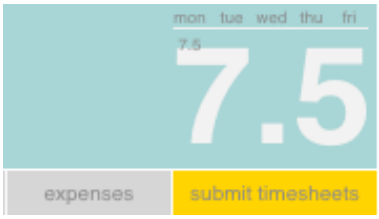
Another function that Timepod offers is the ability to log expenses. This will be covered below.

Adding Expenses as a Designer

Traffic allows you to log expenses to any job in the system. Earlier in this manual we looked at ways of adding expenses to an estimate before work has started. This section will detail how you can record expenses against a job once it is underway.



Traffic Button

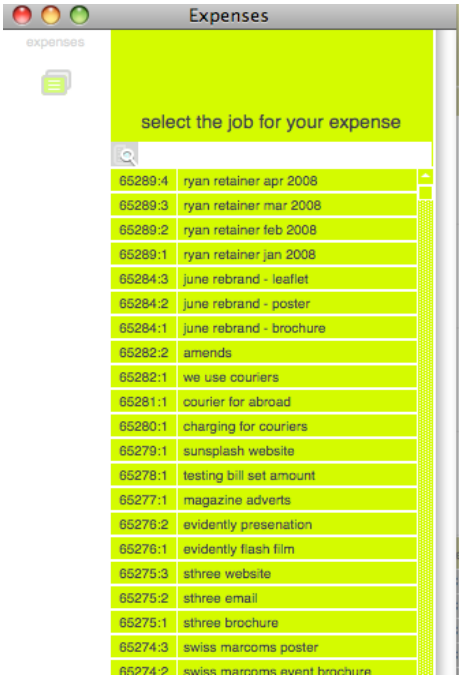


Timepod button

To log expenses, you need to click on the “expenses “ icon. This icon appears at the top of many Traffic screens, below the main set of tabs. You can see it on the Diary, Companies, People, Projects, Orders, Traffic and Sales tabs.

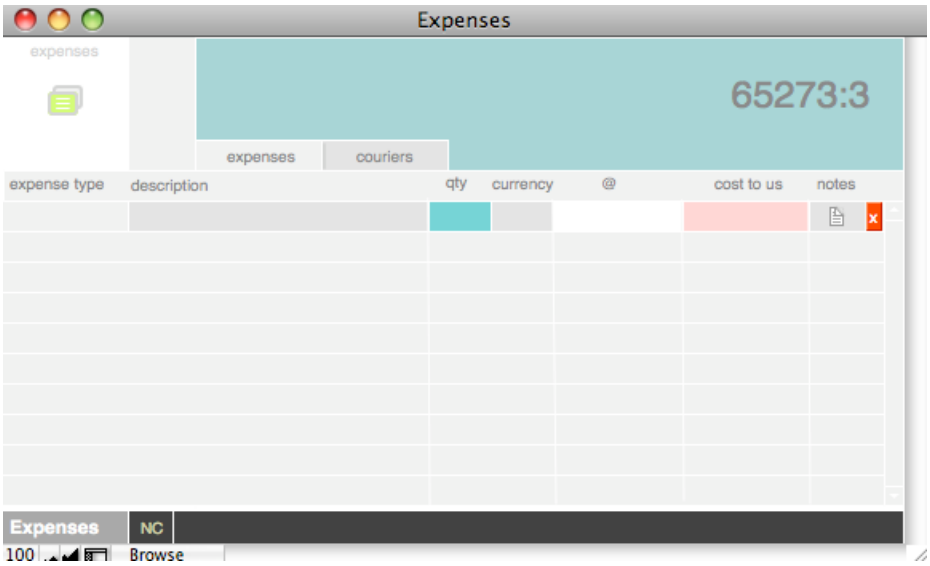
Timepod users can access the same function from the Timepod window by clicking the expenses button at the top right of the screen (just beside the “submit” button). Apart from that, the rest of the procedure is the same.

Once you have clicked the expense button, a list of current jobs will be displayed.



Choose the job you wish to log the expense against from the list. If the list is long, you can use the “find” window at the top of the screen to search for a job by client, project number or job name. (There is no “my jobs” filter for expenses, but only current jobs will appear in the list).

Click on the job line to select it, and the expenses window will open:



This screen allows you to log any expense that is set up in the system, by using the drop down windows.

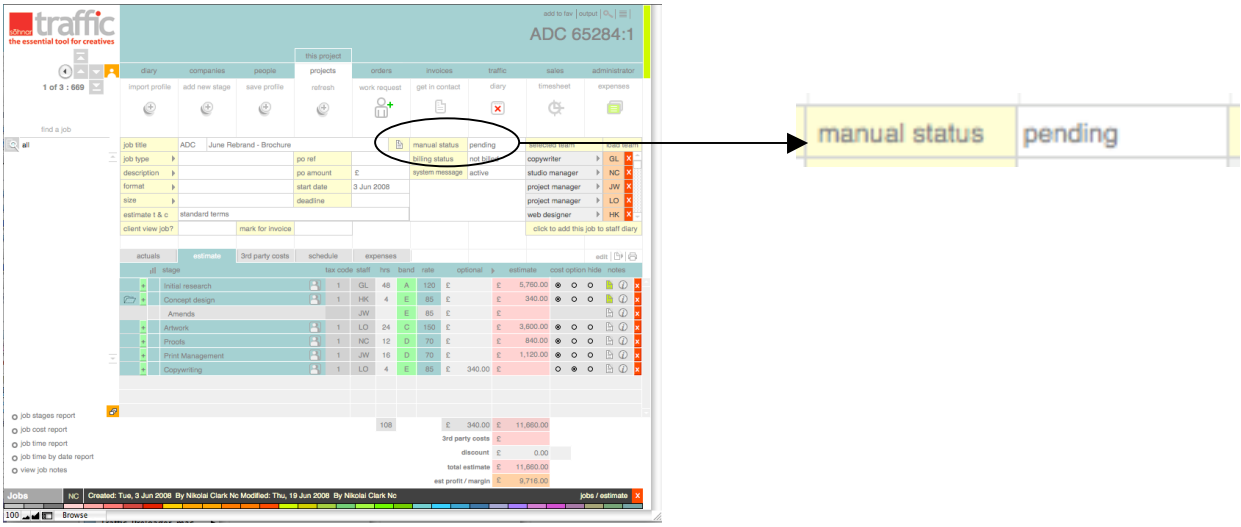
JOB STATUS AND JOB PROGRESS MANAGEMENT

There are many ways that you can manage and monitor the progress of your jobs within the Traffic system. You can set a status for each job to reflect whether it is live or not, you can view various types of information about jobs on the Project summary screen, and you can carry out detailed searches for all your active jobs in the main Projects area. We will look at these different functions below.

Job Status Definitions

Traffic has 6 “job status” definitions, which you can use to help classify all the different jobs running within your business. These are as follows:

- Pending
- Accepted
- On Hold
- Declined
- Completed
- Closed



You can set job status on the full screen view of any job. Once a status is set it can easily be changed to a different status at any time (it is not possible for a job to have no status at all). The suggested use of these status names is as follows:

Pending

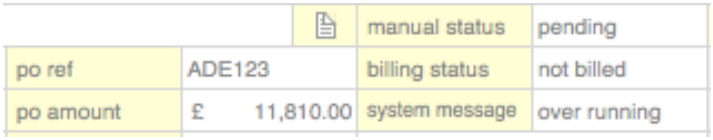
Any job that is still in the planning stages. This might be because it is still being negotiated, or the estimate and schedule are being refined, or the client has not given you the go ahead or supplied you with a purchase order, and so on. Although there is a chance that a pending job may never become fully "live", pending jobs still counts as active in the studio, so they can still have hours logged against them. Stages and tasks appear in people's diaries and timesheet lists, and pending jobs appear in searches and reports on "current" work.

When you create new jobs, they have the status set as "pending" as a default.

Accepted

Any job that has "gone live". This could include jobs where the client has agreed to your estimate, sent you a purchase order, or where chargeable work is now underway. Accepted jobs appear in all searches and reports looking at "current" jobs. Stages and tasks appear in people's diaries, and in timesheet lists.

If you wish to record a Purchase Order from a client in Traffic, the place to do it is on the job screen, just to the left of the manual status boxes.



Declined

Should be used for jobs that are not being pursued. This might be because the client has turned down the work or the job has been otherwise abandoned. The job will not appear in searches or reports on "current" work. You can mark a job as declined regardless of whether work has been done on it or not.

On Hold

Should be used for jobs that are suspended temporarily, but that you expect to resume work on, or take through to completion at some future date. Most companies have their Traffic systems set up to exclude the status of "on hold" from current work searches and reports, but this can be changed if you wish to see "on hold" jobs showing along with all your live jobs.

Completed

Should be used for jobs where all expected work has been completed, and the job is ready to bill (or ready to bill final instalment). This status will stop jobs appearing in diaries, and timesheet job lists, as well as in searches and reports on "current" work. This status can be particularly useful as a way of identifying jobs that are ready to invoice.

Closed

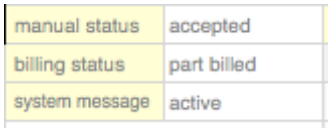
This should be used to mark a job as invoiced. This status will stop jobs appearing in diaries, and timesheet job lists, as well as in searches and reports on "current" work. Some users prefer to wait until invoice are paid before changing to closed status.

What is a "current' job?

"Current" is a system status within the Traffic system. It is applied automatically. Usually, your Traffic system will be set to identify PENDING and ACCEPTED jobs as "current", and exclude ON HOLD, DECLINED, COMPLETED and CLOSED jobs. (This definition can be changed in the Administrator area). In timesheets, only current jobs will be available for staff to log hours against. Many searches and reports default to only showing data about "current' jobs, and non-current jobs can only be found via specific searches.

Billing Status

Traffic will tell you the billing status of any active job automatically. To see billing status update automatically, you must put the job into "accepted" status, or any other status that follows this. "Pending" jobs do not show billing status.



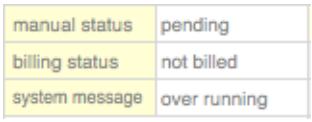
Billing status messages appear on the main job screen and against job titles in some searches and reports. The status names are as follows:

- Not Billed – Any job yet to be invoiced, or a job still set as "pending".
- Work In Progress – Any job with work (timesheets) done but no invoices raised.
- Ready to Bill – Displayed if there are any purchase orders or expenses added to the job. Also obtained by marking the manual status as "Completed".
- Part billed – Any job where some of the work has been invoiced.
- Billed – A job where all available amounts have been billed.

- Any of the “billed” status messages may also be accompanied by “part-paid” or “paid”, if the system detects that payments received have been added to the invoice.

System Message

In Traffic there are some status names that update automatically. These do not over-ride the six basic status types listed in the previous section, but appear underneath them and against job names in some reports and searches.



Active

Any job where work has been started.

Overrunning

You will see the status of overrunning applied to any job where more timesheet hours have been logged against a stage than were estimated for that stage. This does not mean that the entire job is overrunning, but Traffic gives you the earliest possible warning of any overrunning hours, so that you can check the job and act accordingly.

Stages Completed

A special message that you will see if you are using the check boxes on the project summary screen to mark off each stage in a job as “done”. When all stages are marked as done, this message appears. This will be explained in more detail in the next section in this manual.

Completed

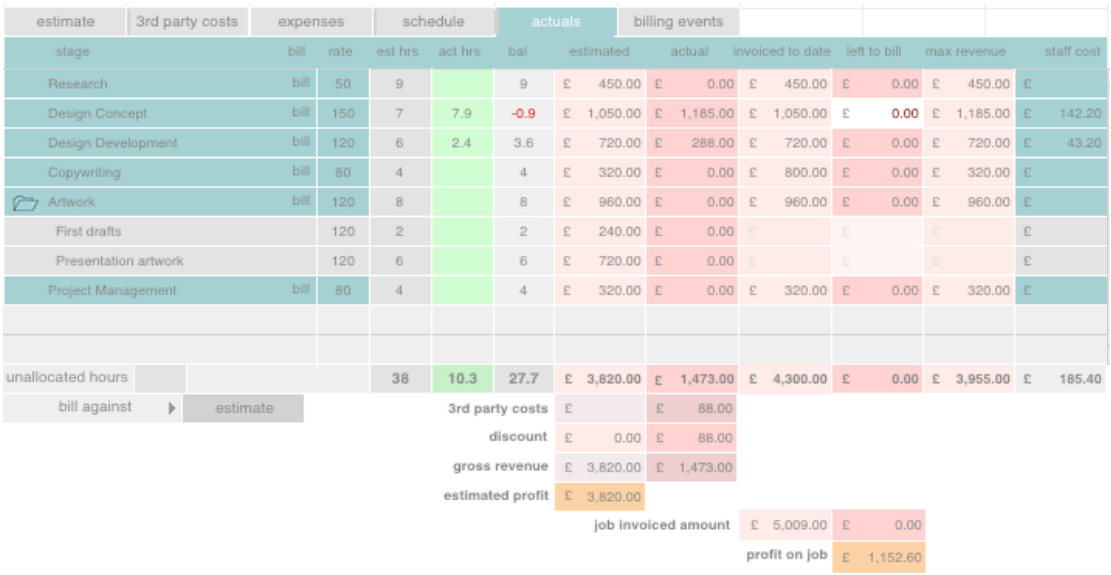
Any job marked as “completed” also has this as a system message.

Closed

Any job marked as “closed” also has this as a system message.

There are other ares on the main job screen where useful information can be found

At the bottom half of the screen (where the estimate is displayed), there is a tab called “actuals”, which contains a lot of information about progress to date on the job:



estimate	3rd party costs	expenses	schedule	actuals	billing events

stage	bill	rate	est hrs	act hrs	bal	estimated	actual	invoiced to date	left to bill	max revenue	staff cost
Research	bill	50	9		9	£ 450.00	£ 0.00	£ 450.00	£ 0.00	£ 450.00	£
Design Concept	bill	150	7	7.9	-0.9	£ 1,050.00	£ 1,185.00	£ 1,050.00	£ 0.00	£ 1,185.00	£ 142.20
Design Development	bill	120	6	2.4	3.6	£ 720.00	£ 288.00	£ 720.00	£ 0.00	£ 720.00	£ 43.20
Copywriting	bill	80	4		4	£ 320.00	£ 0.00	£ 800.00	£ 0.00	£ 320.00	£
Artwork	bill	120	8		8	£ 960.00	£ 0.00	£ 960.00	£ 0.00	£ 960.00	£
First drafts		120	2		2	£ 240.00	£ 0.00	£	£	£	£
Presentation artwork		120	6		6	£ 720.00	£ 0.00	£	£	£	£
Project Management	bill	80	4		4	£ 320.00	£ 0.00	£ 320.00	£ 0.00	£ 320.00	£
unallocated hours			38	10.3	27.7	£ 3,820.00	£ 1,473.00	£ 4,300.00	£ 0.00	£ 3,955.00	£ 185.40

bill against estimate

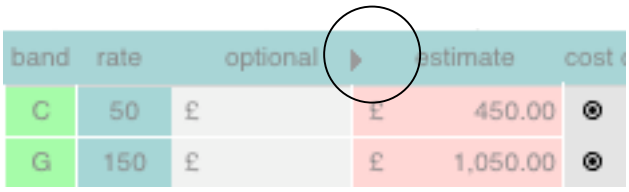
3rd party costs	£	£ 88.00
discount	£ 0.00	£ 88.00
gross revenue	£ 3,820.00	£ 1,473.00
estimated profit	£ 3,820.00	

job invoiced amount	£ 5,009.00	£ 0.00
profit on job	£ 1,152.60	

The columns show the number of estimated hours per stage against the number of actual hours, plus the examining balance. Any overruns are shown in RED.
The value of the estimated and actual time is also shown, plus line items which have been invoiced, amounts still to bill, maximum revenue (based on the “bill against estimate or actual” setting of the job), and staff cost. Staff cost will only show if you have entered staff salaries into Traffic in the Administrator area.

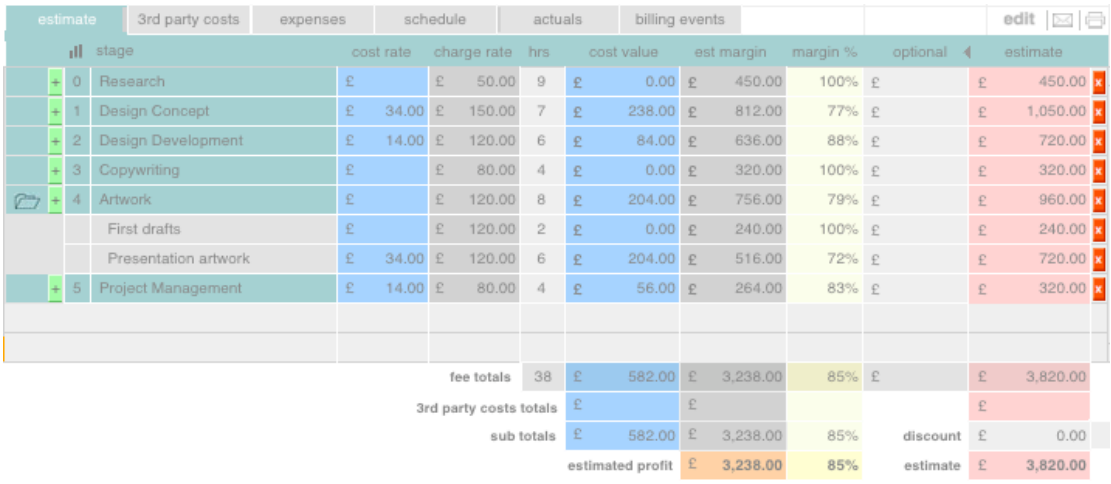
There is also a very useful window in the bottom left corner called “unallocated hours”. This will show you if there are any timesheets submitted that were not linked to a stage. Timesheets entered in this way cannot be billed or reported on, so it is important that you identify these when they happen. Use the blue **“time”** link on the project summary screen to see all timesheets on the job, and find the unallocated ones.
The next section will deal with looking at the progress of projects and jobs in other ways.

There is one more area on the job screen that may show useful information, it is found by clicking the triangle/arrow button on the top part of the estimate layout, between the optional and estimate column headers:



band	rate	optional		estimate	cost
C	50	£	£	450.00	
G	150	£	£	1,050.00	

Clicking this icon opens up another layout that displays useful financial information:



estimate | 3rd party costs | expenses | schedule | actuals | billing events | edit

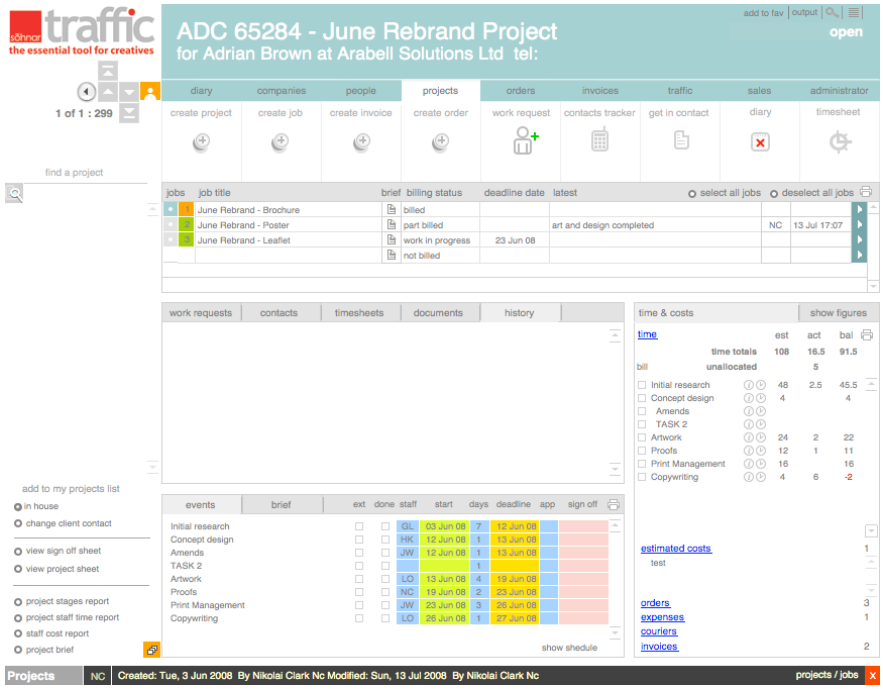
		stage	cost rate	charge rate	hrs	cost value	est margin	margin %	optional	estimate
+	0	Research	£	£ 50.00	9	£ 0.00	£ 450.00	100%	£	£ 450.00
+	1	Design Concept	£ 34.00	£ 150.00	7	£ 238.00	£ 812.00	77%	£	£ 1,050.00
+	2	Design Development	£ 14.00	£ 120.00	6	£ 84.00	£ 636.00	88%	£	£ 720.00
+	3	Copywriting	£	£ 80.00	4	£ 0.00	£ 320.00	100%	£	£ 320.00
+	4	Artwork	£	£ 120.00	8	£ 204.00	£ 756.00	79%	£	£ 960.00
		First drafts	£	£ 120.00	2	£ 0.00	£ 240.00	100%	£	£ 240.00
		Presentation artwork	£ 34.00	£ 120.00	6	£ 204.00	£ 516.00	72%	£	£ 720.00
+	5	Project Management	£ 14.00	£ 80.00	4	£ 56.00	£ 264.00	83%	£	£ 320.00
				fee totals	38	£ 582.00	£ 3,238.00	85%	£	£ 3,820.00
				3rd party costs totals		£	£			£
				sub totals		£ 582.00	£ 3,238.00	85%	discount	£ 0.00
						estimated profit	£ 3,238.00	85%	estimate	£ 3,820.00

The column on the left shows “cost rate”. This will display a figure if you have allocated a staff member to the stage. It will show the cost to the business of that person (if their salary has been entered into the system)

If no-one has been assigned but you would still like an average or forecast cost figure to show here, you can do this by assigning a CHARGE BAND COST to the charge bands, so that every charge band you use will show what the expected cost to the business of that charge band will be in this field. Charge band costs can be added to your charge bands in the Administrator tab of Traffic. On the charge bands screen, use the button labelled “show costs” to change the view to one where charge band costs can be added/amended (this is described again in the section of Administrator later in this manual).
Other columns on this layout show the charge rate (per hour) of each stage, the cost value (of actual timesheets done so far for each stage), the estimated profit margin and the actual margin.

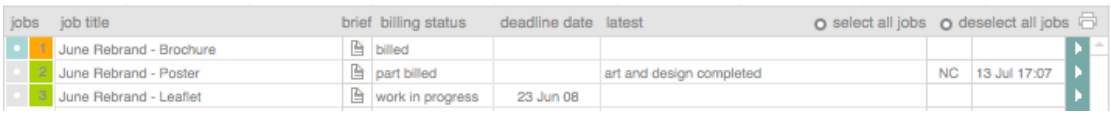
THE PROJECT SUMMARY SCREEN

The Traffic system has many areas where you can see an overview of current work. In each individual project, there are many ways to keep track of how work is progressing. A lot of information can be seen in the main project summary screen.



This section will go through the various options available to you on this screen.

Jobs list

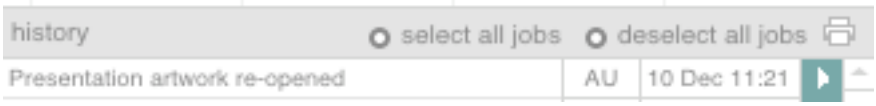


At the top of the screen is a list of all the jobs within the project. Clicking on the green arrow button on the far right of each line will take you into that specific job. The square button on the left of each line will select or deselect the job. On each job line you can see further details about status, history notes and so on.

Selecting /deselecting jobs.

Every job line has a select/deselect button on the far left on the project summary screen. This button controls many useful functions found in this view.

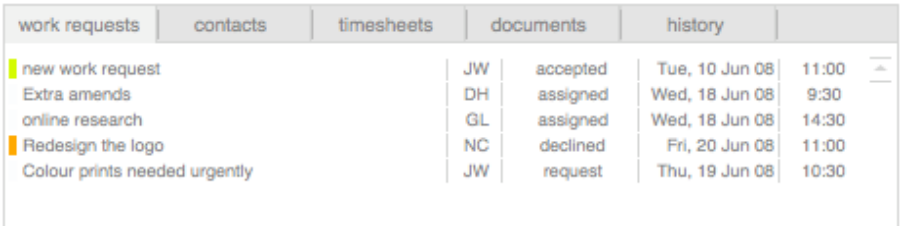
Clicking the square "select" button will display job details on the project summary screen. It is also used to select jobs before raising orders and invoices for them. When a job is selected, you can see many details on the project summary screen. In the remainder of this section, information viewed will depend on whether jobs are selected in this way or not. Notice that there are buttons that let you "select all jobs" or "deselect all jobs" at the top of the job summary window



In the central area of the project summary screen are five tabs, all of which show information about the jobs within that project.

Work requests

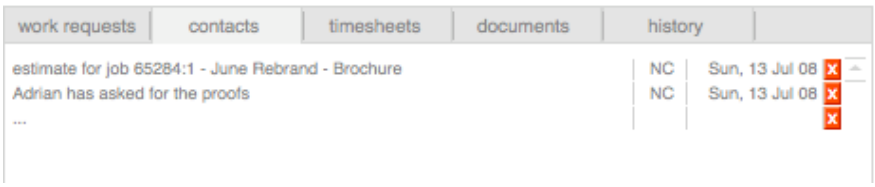
Shows all work requests issued that relate to the selected job or jobs within the project.



Click on any line to open the Work Request in a separate window and view or amend/reassign the request.

Contacts

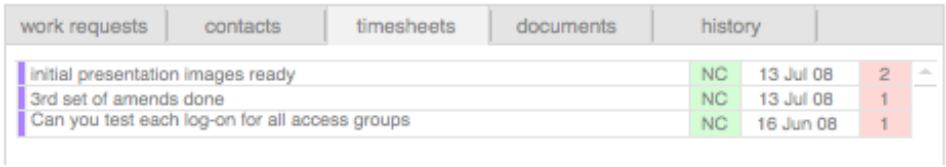
Shows all Contact Records that are linked to the selected job or jobs within the project. These might be emails containing estimates or orders, or just calls recorded about the job.



Click on any line to open the contact record in a separate window.

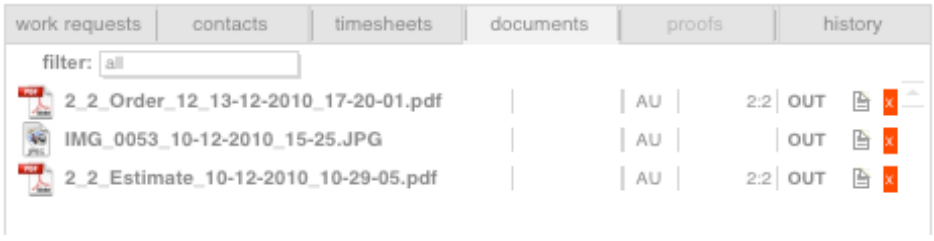
Timesheets

Shows a summary of all timesheets logged against the selected job or jobs within a project.

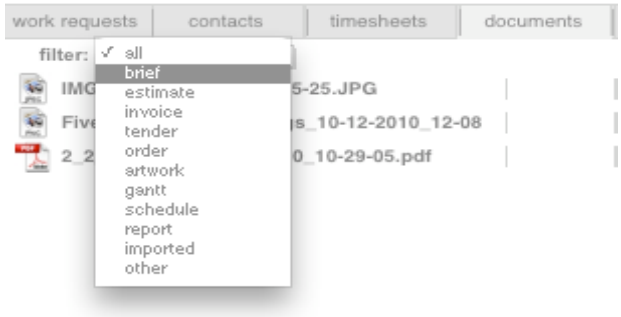


Documents

Shows PDFs of documents associated with jobs within the project. Every time you create a printed copy or email record of an estimate, order, tender or invoice, Traffic will automatically save that document as a PDF and store it on your designated Traffic server. This tab will allow you to open and view all saved PDFs by simply clicking the icon.



You can also upload your own documents into Traffic.
Note that the document view has it's own filter options. It is not filtered by selecting jobs.

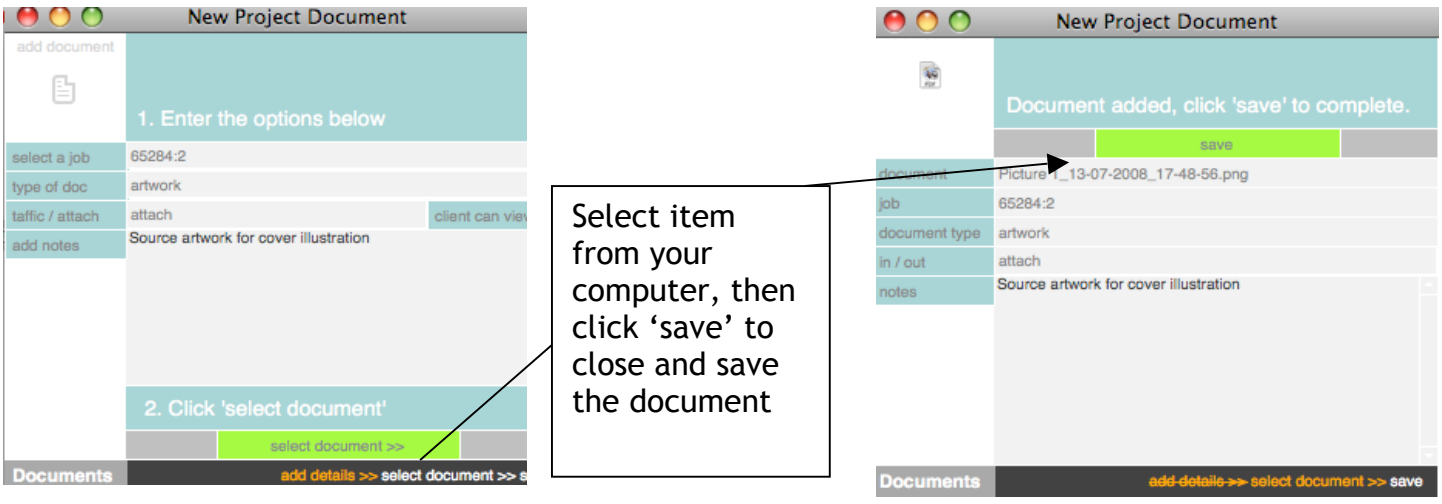


These status options are automatically set by the system when documents are saved. You can also choose it manually when you upload your own documents into Traffic.

Adding documents into Traffic

To save a document in Traffic, look for the plus button marked “add document” at the top of the project summary screen. It appears under the main projects tab, but it will only be displayed when you have the “documents” tab selected on the screen.

To add a document, simply click on this icon and a small window will appear. You can now choose to enter details about the document (type, which job it relates to, etc). Next click on the green bar marked “select document” and you will be able to search your computer for the required item. Once you select it, the pop up window will offer you the option to “save the document” by using the green bar.

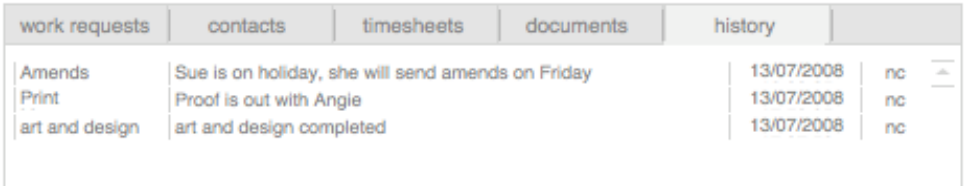


Documents that you upload in this way can be accessed in the same way as the PDFs that Traffic creates, by checking in the “documents” tab on the project summary.

Remember, that documents can also be found in the documents tab under the Company records section of Traffic, and uploaded documents will also appear here, under the company record of the client for the project.

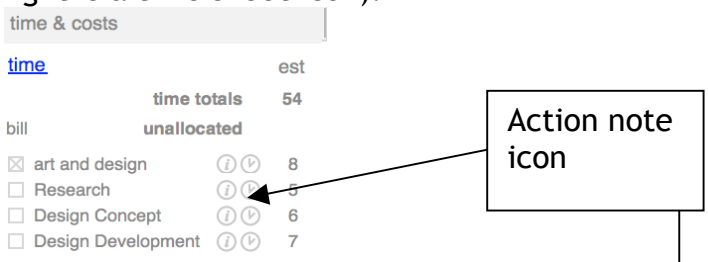
The History tab

This tab allows you to see records or action notes about the progress of a job. You can enter action notes against the stages of a job for internal purposes, especially in instances when work is with the client for approval.

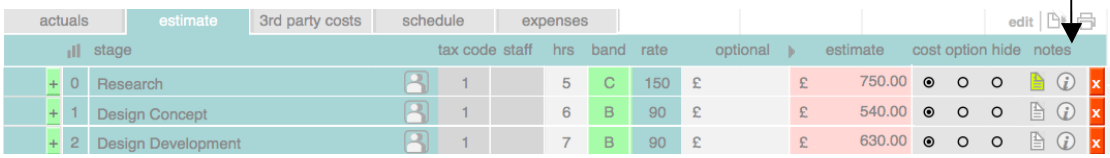


To add an action note, you need to click on the “action” icon against any stage name. This icon appears in two places in Traffic:

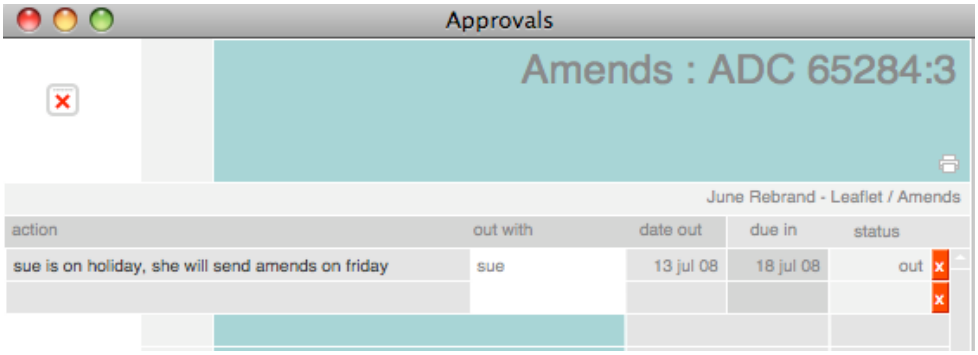
Against each stage name on the project summary screen (there are two icons here, the one on the right is a time sheet icon).



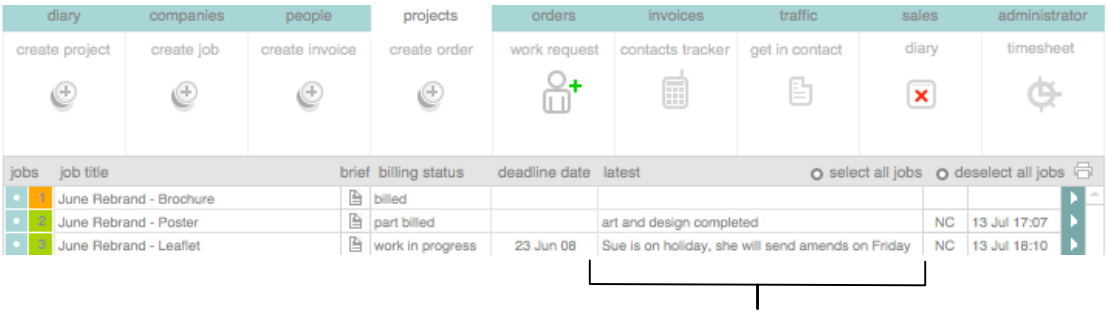
On each stage line on the job screen estimate.



Click on this icon to open the action note window. Enter details of the note. Optional fields allow you to record details of stages that are awaiting approval. You can add more than one note to any stage.



Action notes can be seen under the history tab, with the newest note appearing at the top. You can also see the latest action note (on any stage) at the top of the project summary screen against the individual job names.



Latest action notes

Action notes are automatically recorded each time a user clicks any stage or task as “done”. An action note will be added saying “{stage or task name} Completed”

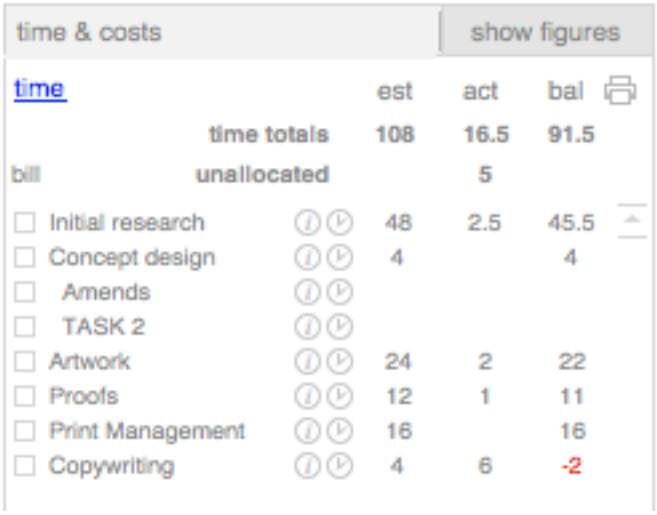
If the check is removed from the done status box, another action note will be added saying “{stage or task name} Re-opened”

More information about project progress can now be looked at on the right hand corner of the screen.

Stage Summary

The right hand side of the project summary screen shows all stages of jobs within the project. It also gives a clear indication of the amount of time logged against stages. Remember this information is only displayed if the job is select/highlighted at the top of the screen.

Here you can see the amounts of hours for each stage in three columns:



- EST – the estimated hours for each stage.
- ACT – the actual hours logged via timesheets.
- BAL – the remaining balance of actual hours in relation to the estimated hours.

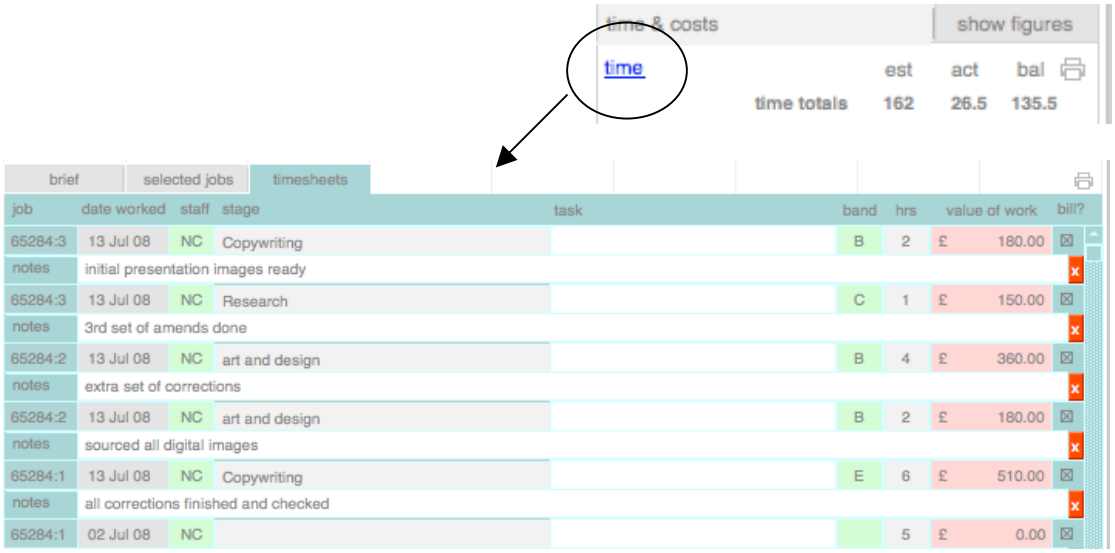
At the top are job totals. If you have all jobs within a project selected, all job stages, hours and totals are displayed, giving you a summary of the hours for the whole project.

Note: overrunning hours appear in RED with a minus symbol beside them (in our example above, the Copywriting stage has overrun by two hours).

If there are any unallocated hours, these are shown in a separate line above the stages (for more information about unallocated hours, see the section on Timesheets).
If a stage has tasks under it and there are not showing, click on the stage name to reveal the tasks. Seeing the tasks may show an over-run of timesheets at task level that was not visible at stage level!

Click the stage name again to hide the tasks.

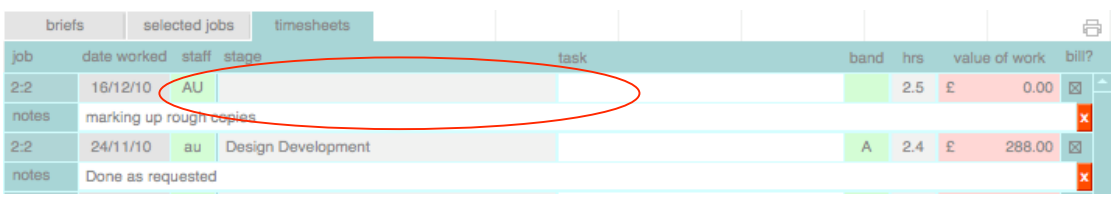
By clicking on the blue “time” link on this screen you can view all the timesheets against the job(s) in full.



(The screen that displays these time entries can also be navigated to by clicking the “view project sheet” icon, and then choosing the timesheets tab).

This useful screen lets you see all the full timesheet entries for job(s) within a project. On each line you can also see the billable value of the work done, and should you need to, you can edit the timesheet lines from this screen. This includes changing the selected stage and/or task for the hours, amending the time itself, marking hours as billable or not, and even deleting lines. It is recommended that only managers have access to this area.

Unallocated hours
It is very useful to come to this area if you find there are “unallocated” hours against a job, and you wish to re-assign these. In the example below, you can see that the top timesheet is 2.5 hours of work that has not been put against a stage. It has no charge-band and thus no chargeable value either:



Unallocated hours cannot be charged, measure in value or reported on. For this reason it is best to avoid them by telling staff that ALL timesheets must be assigned to a stage, not just a job.

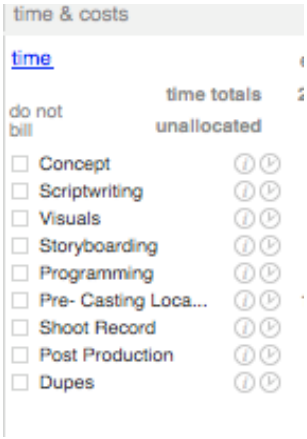
These hours can, however, be re-assigned to a stage from this view:

1. Simply click on the empty stage name box on the timesheet line.
2. A box pops up showing you the stages within the job.
3. Click on the stage name you wish the hours to be moved to
4. The timesheet view will now show the hours have been assigned, and they will take on the value of the charge band against the stage.

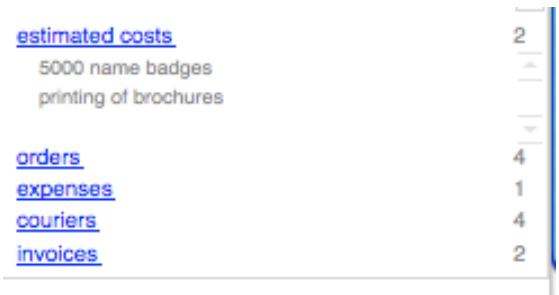
From this screen, you can click the “this project” tab at the top of the main screen to go back to the previous project summary screen, and go back to looking at the details down the right hand side of the screen.

The “Do Not Bill” box

Beside each stage name there is a box marked “do not bill”. If you check this box, it makes the stage non-billable when you raise an invoice. Use this function if you have stages that should not be billed, or if you have billed a stage to estimate, and it has more actual hours that you cannot bill. Checking “do not bill” for all stages with remaining unbilled amounts will tell the system to ignore them, and the job billing status will change to “billed” rather then remaining as “part billed”

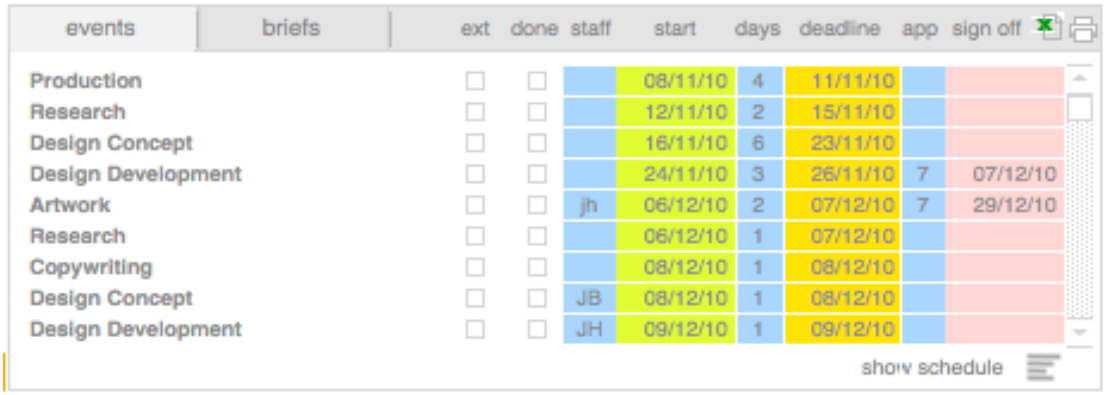


Underneath the list of stages you can see more information. The lower right corner of the project summary screen shows a summary of costs against jobs within the project.



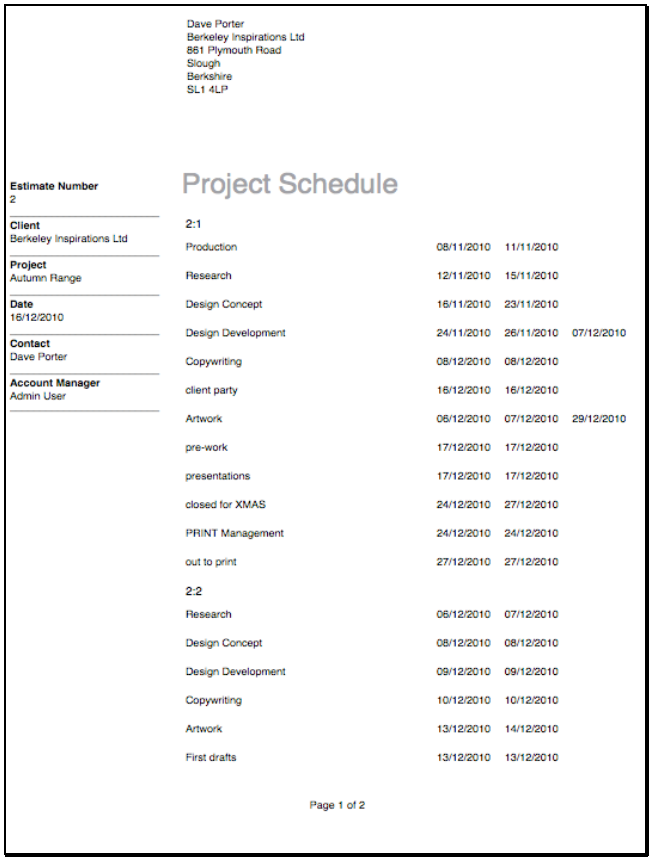
Estimated costs against jobs, with each cost listed, and a costs total on the right.
Orders, Expenses, Couriers and Invoices will all display a number if any have been entered into the system for the job(s) currently displayed. Each of the links in blue will display more details when clicked.

Under the central area of tabs you can see a summary of any schedules created, under a tab called “Events”.



This area has boxes against each line called “ext” and “done”.
EXT – check this box if you wish your clients to be able to view this stage in the Client Module (see separate section for more details).
DONE – check this to leave an automatic action note to say that the stage is completed. Stages marked as “done” also move down in the list to the bottom, so that the stages that are still current remain at the top.

The print icon at the top right allows you to print the Project Schedule. This is a document style view of all the jobs, with each stage listed showing it’s start and end date:



Dave Porter
Berkeley Inspirations Ltd
861 Plymouth Road
Slough
Berkshire
SL1 4LP

Estimate Number
2

Client
Berkeley Inspirations Ltd

Project
Autumn Range

Date
16/12/2010

Contact
Dave Porter

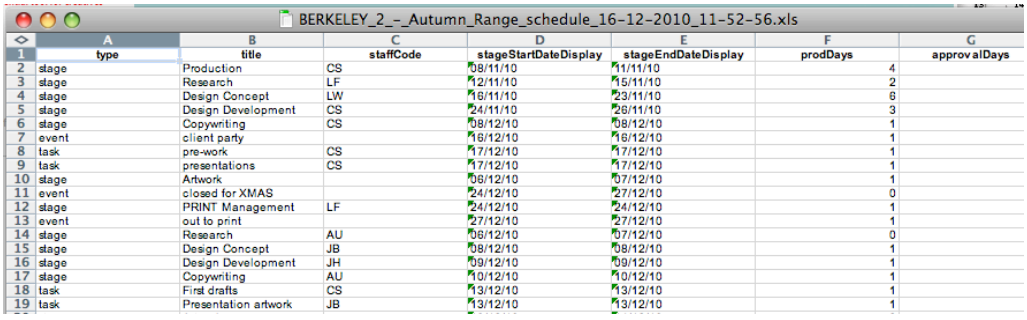
Account Manager
Admin User

Project Schedule

2:1			
Production	08/11/2010	11/11/2010	
Research	12/11/2010	15/11/2010	
Design Concept	16/11/2010	23/11/2010	
Design Development	24/11/2010	26/11/2010	07/12/2010
Copywriting	08/12/2010	08/12/2010	
client party	16/12/2010	16/12/2010	
Artwork	06/12/2010	07/12/2010	29/12/2010
pre-work	17/12/2010	17/12/2010	
presentations	17/12/2010	17/12/2010	
closed for XMAS	24/12/2010	27/12/2010	
PRINT Management	24/12/2010	24/12/2010	
out to print	27/12/2010	27/12/2010	
2:2			
Research	06/12/2010	07/12/2010	
Design Concept	08/12/2010	08/12/2010	
Design Development	09/12/2010	09/12/2010	
Copywriting	10/12/2010	10/12/2010	
Artwork	13/12/2010	14/12/2010	
First drafts	13/12/2010	13/12/2010	

Page 1 of 2

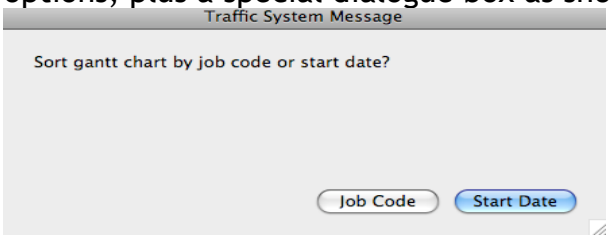
The Excel icon creates an excel spreadsheet of the stages with their start and end dates (not a gantt chart)



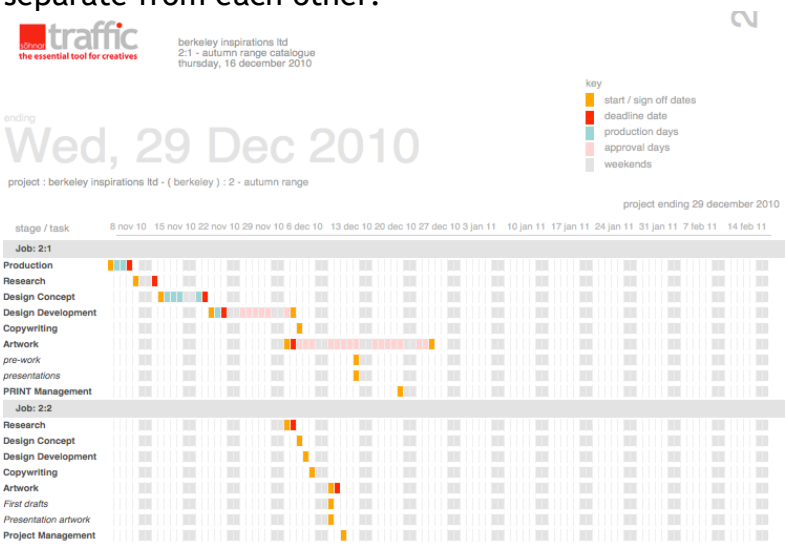
BERKELEY_2_-_Autumn_Range_schedule_16-12-2010_11-52-56.xls

	A	B	C	D	E	F	G
1	type	title	staffCode	stageStartDateDisplay	stageEndDateDisplay	prodDays	approvalDays
2	stage	Production	CS	08/11/10	11/11/10	4	
3	stage	Research	LF	12/11/10	15/11/10	2	
4	stage	Design Concept	LW	16/11/10	23/11/10	6	
5	stage	Design Development	CS	24/11/10	26/11/10	3	
6	stage	Copywriting	CS	08/12/10	08/12/10	1	
7	event	client party		16/12/10	16/12/10	1	
8	task	pre-work	CS	17/12/10	17/12/10	1	
9	task	presentations	CS	17/12/10	17/12/10	1	
10	stage	Artwork		06/12/10	07/12/10	1	
11	event	closed for XMAS		24/12/10	27/12/10	0	
12	stage	PRINT Management	LF	24/12/10	24/12/10	1	
13	event	out to print		27/12/10	27/12/10	1	
14	stage	Research	AU	06/12/10	07/12/10	0	
15	stage	Design Concept	JB	08/12/10	08/12/10	1	
16	stage	Design Development	JH	09/12/10	09/12/10	1	
17	stage	Copywriting	AU	10/12/10	10/12/10	1	
18	task	First drafts	CS	13/12/10	13/12/10	1	
19	task	Presentation artwork	JB	13/12/10	13/12/10	1	

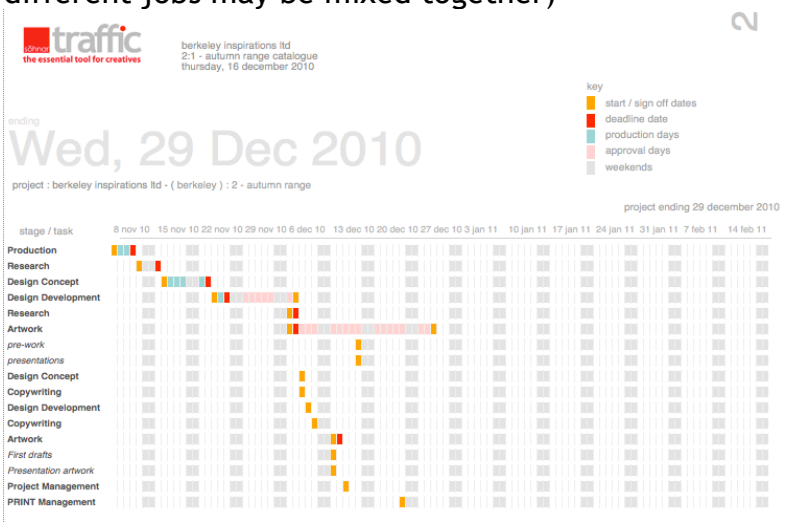
The “Gantt” icon at the bottom right corner of this area enables you t print a project Gantt chart. Clicking this icon brings up the usual print/preview options, plus a special dialogue box as shows below:



Click “job code” to show each job gantt chart one after the other, but separate from each other.



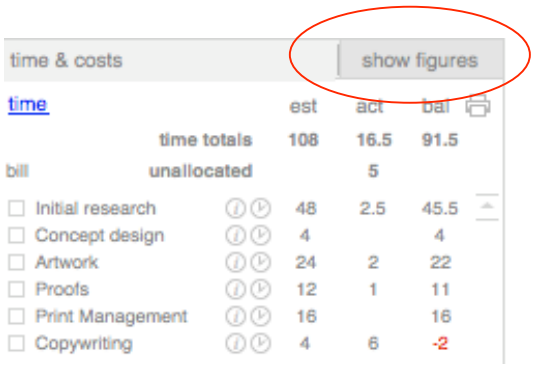
Click “start date” to show one chart containing all job stages running in date order (This choice does not show the job titles, and stages from different jobs may be mixed together)



The “Brief” tab to the right of the “Events” tab will show you the project brief – this can also be printed.

Viewing Financial Information

Traffic users with a high level of access will be able to view financial information about jobs and projects. On the right of the project summary screen, you will see a button called “show figures”:

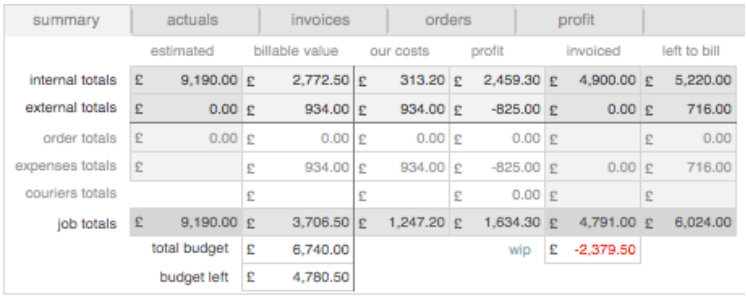


This button will enable you to see five extra tabs, which replace the Work requests, contacts, timesheets, documents and history tabs in the central portion of the screen. Click “show figures and these tabs will now be called summary, actuals, invoices, orders and profit.

(You can return to the normal view at any time by clicking the same button again – in financial view mode, the button will say “hide figures”).

ALL FIGURES DISPLAYED IN THESE TABS RELATE TO WHICHEVER JOB OR JOBS ARE SELECTED AT THE TOP OF THE SCREEN.

Summary

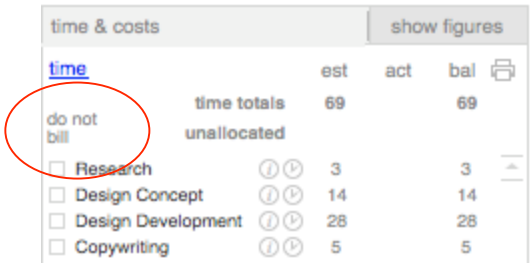

summary
actuals
invoices
orders
profit
estimated
billable value
our costs
profit
invoiced
left to bill
internal totals £ 9,190.00 £ 2,772.50 £ 313.20 £ 2,459.30 £ 4,900.00 £ 5,220.00
external totals £ 0.00 £ 934.00 £ 934.00 £ -825.00 £ 0.00 £ 716.00
order totals £ 0.00 £ 0.00 £ 0.00 £ 0.00 £ £ 0.00
expenses totals £ £ 934.00 £ 934.00 £ -825.00 £ 0.00 £ 716.00
couriers totals £ £ 0.00 £ £
job totals £ 9,190.00 £ 3,706.50 £ 1,247.20 £ 1,634.30 £ 4,791.00 £ 6,024.00
total budget £ 6,740.00
budget left £ 4,780.50
wip £ -2,379.50

This table shows a compact summary of the estimated and actual totals of the job. Beside these figures you can also see all the costs against the job and the resulting profit margin too. The columns are as follows:

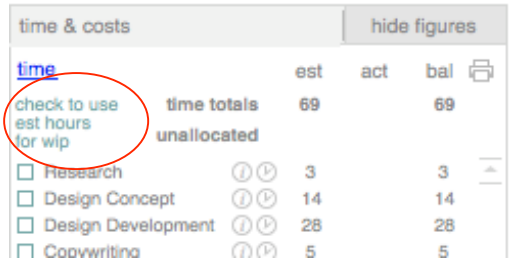
- Estimated – Total estimated fees, plus marked up costs and expenses.
- Billable value – All billable work produced to date, calculated from logged hours, orders and expenses.
- Our Costs – Cost to you of actual work produced to date.
- Profit – Difference between actual and cost
- Invoiced – Any amounts invoiced to date
- Left to bill - Any work that is still to be invoiced
- Total Budget – If you have entered a client PO amount against the job, that figure will show here as your budget figure.
- Budget left – Your budget figure minus any work in progress to date.
- WIP – Value of work in progress to date (timesheets only). A negative WIP means you have billed before doing the work.

WIP values

The WIP figure shown on this screen relates to fee stages only. It is based on the value of actual hours logged onto timesheets. If you do not use the timesheets in Traffic, there is an optional setting to show the estimated value of stages as WIP, instead of the actuals. To access this setting, you must have the "show figures" option displayed. In this view, the column of check boxes beside the stage names changes to "check to use est for wip".



Normal view

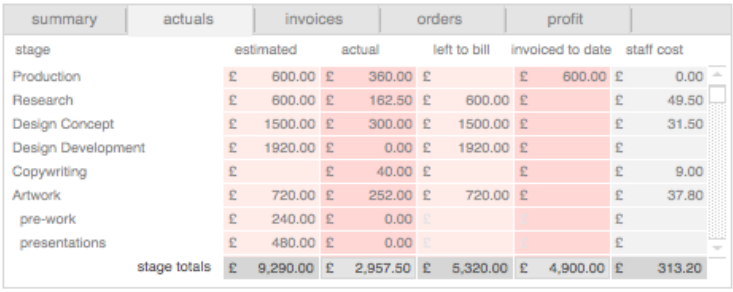


Show Figures view

Use this function if you wish the estimated totals per stage to reflect how much work has been done rather than using timesheets. You need to check each stage individually for that stage value to show in the WIP total.

If used, this function also changes the figure in the WIP field of any reports.

Actuals

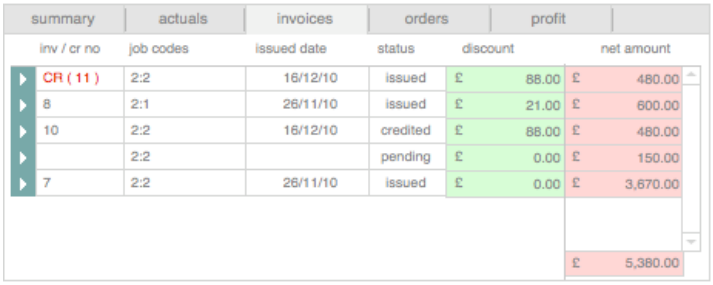

summary
actuals
invoices
orders
profit
stage
estimated
actual
left to bill
invoiced to date
staff cost
Production £ 600.00 £ 360.00 £ £ 600.00 £ 0.00
Research £ 600.00 £ 162.50 £ 600.00 £ £ 49.50
Design Concept £ 1500.00 £ 300.00 £ 1500.00 £ £ 31.50
Design Development £ 1920.00 £ 0.00 £ 1920.00 £ £
Copywriting £ £ 40.00 £ £ £ 9.00
Artwork £ 720.00 £ 252.00 £ 720.00 £ £ 37.80
pre-work £ 240.00 £ 0.00 £ £ £
presentations £ 480.00 £ 0.00 £ £ £
stage totals £ 9,290.00 £ 2,957.50 £ 5,320.00 £ 4,900.00 £ 313.20

Shows billable value of all hours logged on timesheets for the selected job(s). The columns are as follows:

- ESTIMATED – Billable value of estimate for each stage.
- ACTUAL – Billable value of actual hours worked so far.
- LEFT TO BILL – Value of work not yet billed
- INVOICED TO DATE – Value of any invoices raised so far, if they included this stage
- STAFF COST – Cost to you of staff working for the hours logged (based on salary details in Admin area of Traffic).

Invoices

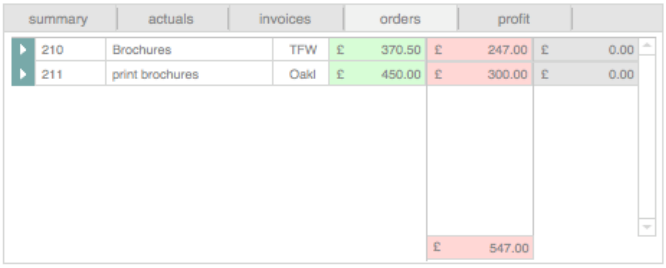
Shows any invoices raised for selected job(s). Note that clicking the blue link "invoices" on the far right of the screen also displays this view



The figure in the pink box is the invoiced amount. If you added any discount to the job totals before invoicing it, this discount figure will appear in the light green box. Clicking the green arrow button on the left will take you to the sales ledger area of Traffic and show the full invoice.
If you have raised any credit notes, these will also be listed here, clearly marked with the letters "CR". If any invoice has no number, this means it is still pending. A total appears at the bottom of the list.

Orders

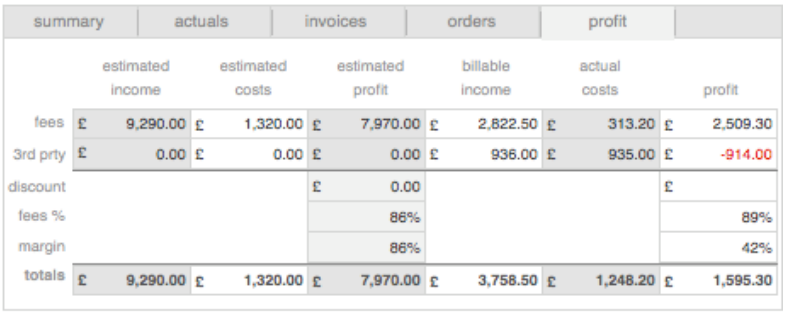
Shows any orders raised for 3rd party costs for selected job(s). Note that clicking the blue link "orders" on the far right of the screen also displays this view.



The figures in the light green box show the cost that appears on your estimate, and the figure in the pink box shows the amount you are paying the supplier for these costs or services. The box on the right will show the invoiced figure (if you enter a purchase invoice for the cost).

Profit

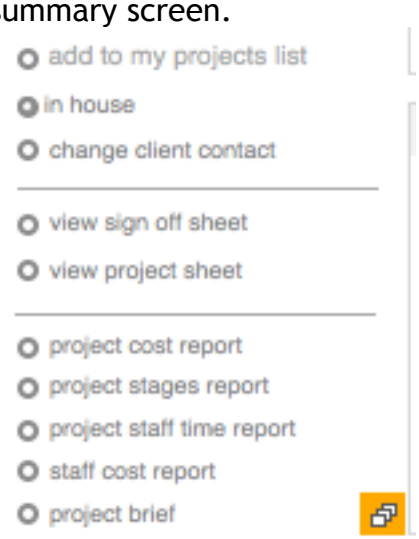
Shows figures relating to profit for selected job(s).



	estimated income	estimated costs	estimated profit	billable income	actual costs	profit
fees	£ 9,290.00	£ 1,320.00	£ 7,970.00	£ 2,822.50	£ 313.20	£ 2,509.30
3rd prty	£ 0.00	£ 0.00	£ 0.00	£ 936.00	£ 935.00	£ -914.00
discount			£ 0.00			£
fees %			86%			89%
margin			86%			42%
totals	£ 9,290.00	£ 1,320.00	£ 7,970.00	£ 3,758.50	£ 1,248.20	£ 1,595.30

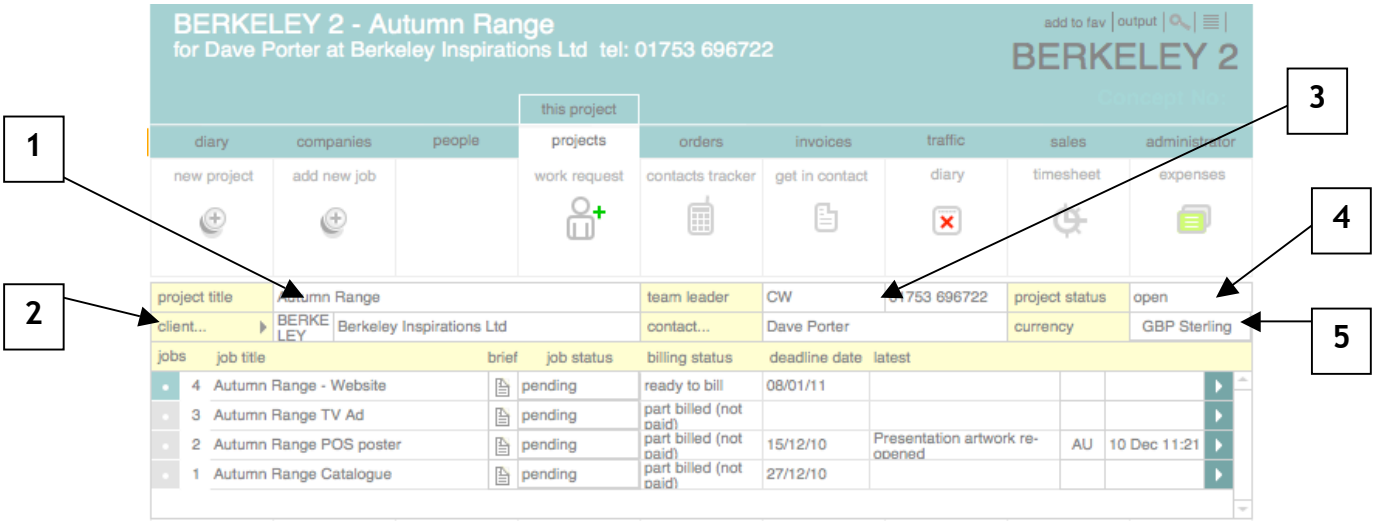
The columns show estimated income, costs, and profit, then billable (actual) income, cost and profit, plus totals at the bottom.

Additional Project Summary Functions
There are still more functions available on the right hand side of the project summary screen.



1. Add to my projects list" Click this button once to add a link to this screen to your main projects home tab.
2. In-house – Click this once to set the project as in-house (non billable)
3. Change client contact – Allows you to reselect the main client contact (person) for this project.
4. View Sign off sheet – View a special end-of-project feedback sheet that you can fill in and/or print off as required. Intended for use after the project is totally completed
5. View Project Sheet – A useful button that returns you to the screen that contains the set up details for the project. If you ever need to rename a project or completely change the client company, project status and team leader, click this button. The project sheet is shown again on the next page with some useful hints about what you can do here.
6. Project reports: there are four project reports you can run here, click each button to see them in turn.
7. Project brief – click this button to open the layout mode view of the project brief document
8. DUPLICATE button – click this orange square icon to duplicate the entire project including any jobs within it. This can take some time to do!

View Project Sheet



As mentioned, it can be very useful to access this layout as it enables you to amend the basic set up details of a project. The available functions on this screen are as follows:

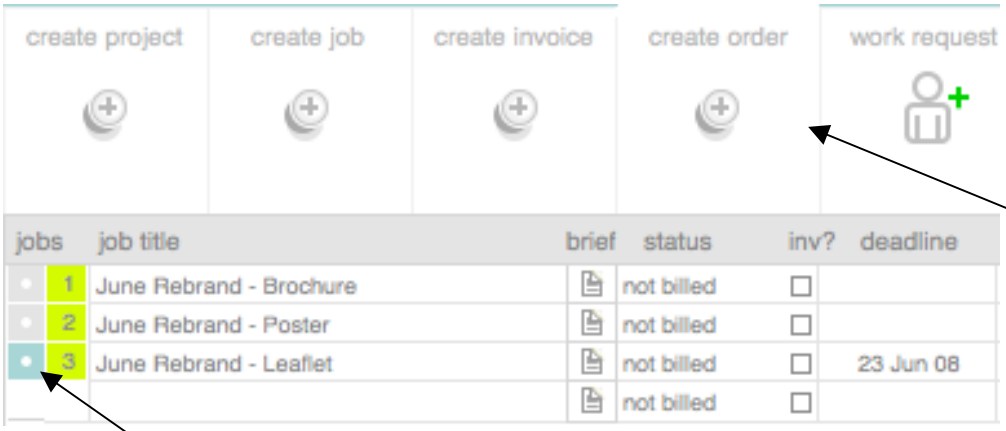
1. Edit Project name – Free type here to change the project name. This is the ONLY place you can change this.
2. Click here (click the yellow “client” box to change the company that the project is created for. Again, this screen is the only place you can do this.
3. Click in this white box to change or add a team leader for the project. Again, this is the only screen where this can be changed
4. Project status – Click here to change project status. Choose from OPEN, ON HOLD, CLOSED or ARCHIVED. Once again, this is the only place you can change this setting.
5. Change currency. Click the box to select another currency for the project. WARNING: DO NOT CHANGE THE CURRENCY OF A PROJECT AFTER ANY JOBS HAVE BEEN CREATED OR ANY WORK HAS BEEN DONE! Doing so will break the relationship between the job figures and the system reports. If you created a project in one currency but realize it needs changing (i.e, if you find out you have to invoice the client in another currency), you must recreate the entire project from scratch. The Traffic system cannot convert amounts from one currency to another once data has been commited.

Please note you cannot alter the number of a project that has already been created.

PURCHASE ORDERS

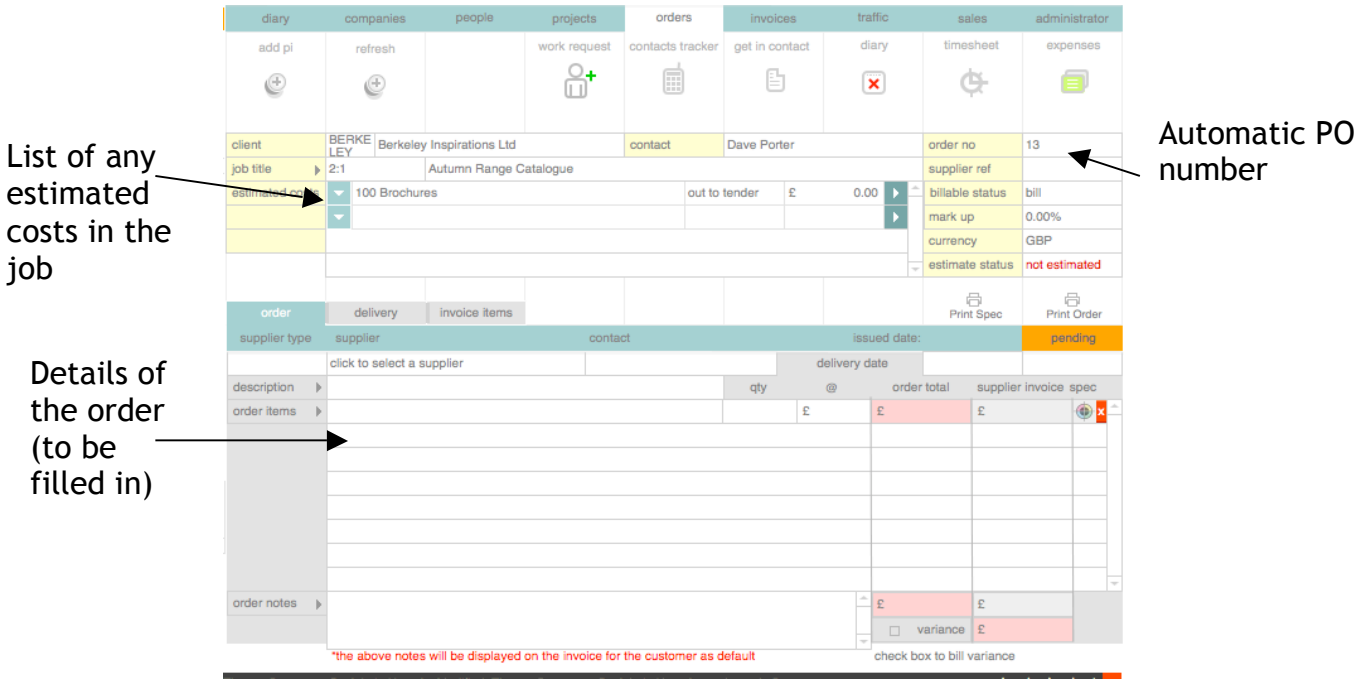
In Traffic, Purchase Orders can only be raised against a job. You may have a project with several job, each of which contain separate estimated costs. Within each of these jobs you will need to raise a purchase order for each cost separately, as purchase order can only account for one cost at a time. However it is possible to create a single estimated cost that contains several line items, in which case your purchase order would be for multiple items. Please refer to the section on Estimating 3rd Party Costs for more detail on this.

The process for creating a Purchase Order is as follows. You need to locate the project containing the job that needs an order, and select the job on the main project summary screen (do not go into the job detail screen)



You can see above that only one job has been selected. Once the job has been selected you can create the purchase order using the 'create order' button in the top panel. Clicking this button will take you to the purchase order screen, where a new (empty) purchase order has immediately been created.

The PO screen looks like this. Note that a unique PO number is assigned automatically, before you even enter any details.



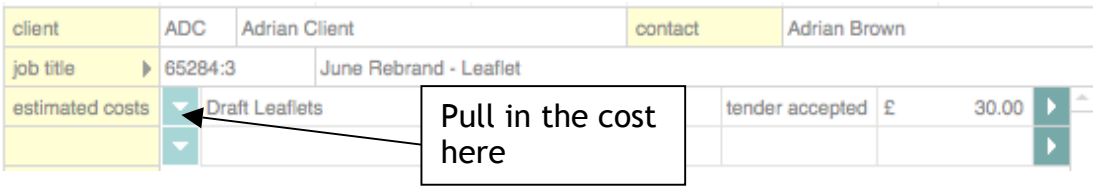
Now that your blank order has been created you have two choices of how to fill it out:

1. Pull in any third party costs from your job and the PO will be automatically populated with information.
2. Free type the whole order by hand (In cases where no cost was estimated beforehand – useful for freelancers or very late orders that are needed after the estimate has already been signed off)

We will look at both of these methods now.

1. **Using pre-estimated costs**

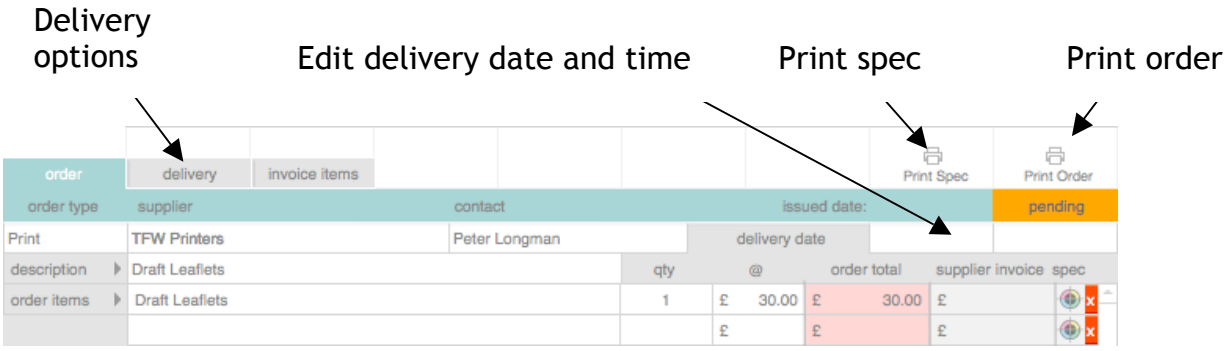
To add estimated costs to the order simply click the green, downward arrow button next to the cost you wish to use. All the cost awaiting orders are listed at the top of the main screen. Once the cost has been pulled down you can't remove it and start again, so be sure that you have the right cost selected.
(If you do pull down the wrong cost, delete the entire order and start again by making a new PO from the project area)



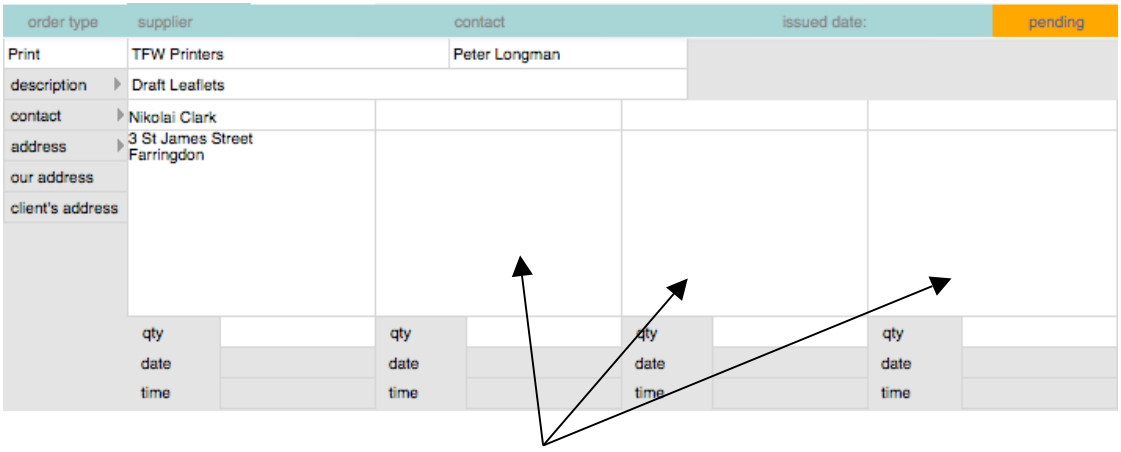
After clicking the arrow button, click ‘yes’ to the prompt that pops up and your third party cost will appear in the section below. Remember that you can only import a single third party cost at a time, and each purchase order will be assigned a number that is generated automatically in sequence from the last order.

The number sequence is independent of the project from which your costs come.

Once you have imported the cost you can choose to print a spec of the cost, print the order itself, choose a date and time for delivery and split the delivery between a number of locations. For example, you may wish to have a sample of a print job delivered to your offices and the balance delivered to the client. These steps are all covered below.



Delivery options can be edited by clicking the ‘delivery’ tab above the order you have created. This will allow you to specify up to four delivery addresses.



To add an address click into the address box you wish to use and either type the address manually or click one of the addresses listed on the left hand side of the screen to have Traffic automatically fill in the relevant address details. The set options you can bring in are your own address or the client's address. Under the address field is another field where you can specify the quantity to deliver to each address. This is a free type field so you can type "file copies", or "samples" or "total order" (for example) if you wish.

Once you have completed all the necessary details simply click 'Print Order' to have the order printed. You will be asked whether you wish to include the spec for the item(s) in the purchase order. If you do not wish to include a spec then click no, and the order will be brought up on screen for you to check it (as with other traffic documents there is an "edit" and "preview" mode for you to look at the document before sending it.

To output the order, hit "print". An option to email the order comes after you choose the "print" option". After printing or emailing, the status of the order will be changed from 'pending' to 'issued'

As with all Traffic documents, a PDF will be saved in the system at the point of printing or emailing, and in the case of emailing, a contact record will also be saved.

If you wish to set the status of the order manually you can do this by clicking on the status field and changing it to 'issued' or any of the other options. You might do this if you do not need to physically send the PO.

2. Raising a PO without estimating costs beforehand

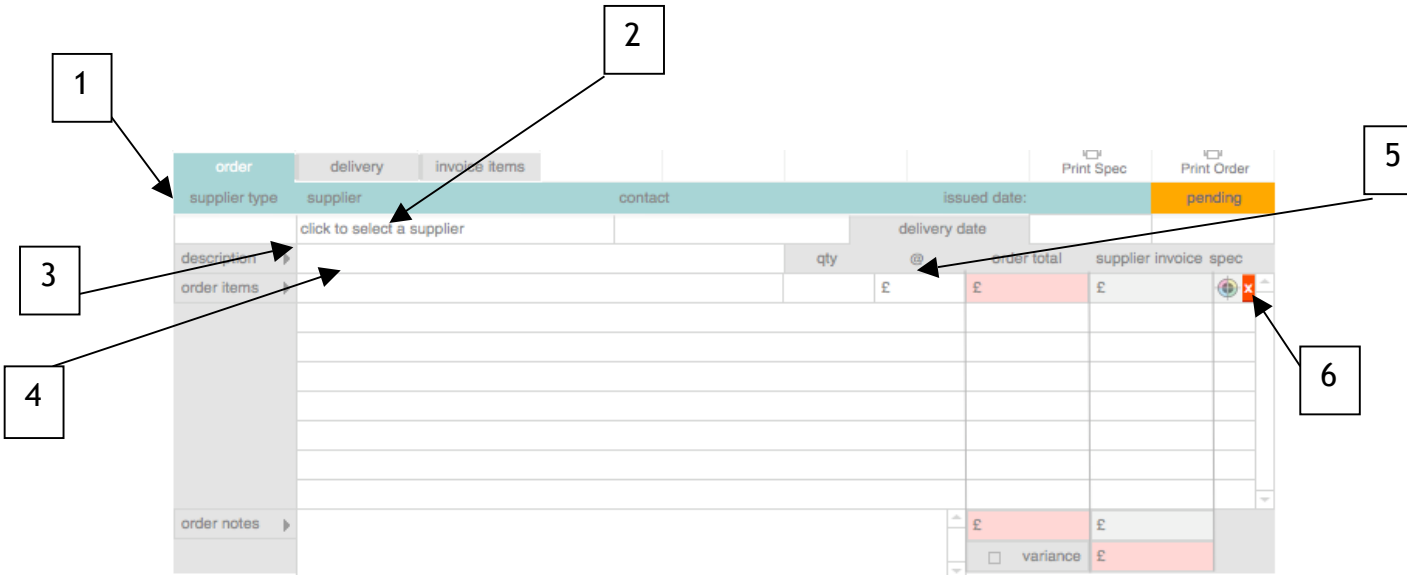
In this example, we need a purchase order to pay a freelancer, who was drafted in to help out, but not added to the job quote as an estimated cost (we are not advertising that we outsource this work). The client will still be paying our standard agency rate as quoted, all we need to do is raise a PO to add the appropriate costs to the job. This PO will not be on-billed.

You could also do this in other situations where you need to order in any goods or services and there is not need for them to appear on the estimate.

The steps to manually creating an order are much the same as using an estimated cost:

1. Go to project summary containing the job that you need the order for, highlight the job and click the “Create order” plus button
2. You will be taken to the order screen with a new blank order in front of you(a number will automatically be assigned).

In this case we are not going to import any estimated cost from the upper part of the screen. Instead we can free type all the details we require directly into the fields on the bottom half of the screen as shown below



1. Select supplier type from list
2. Click here to search for and select supplier
3. Type in a description for the purchase order
4. Type in line items as required.
5. Type in a quantity and cost for each line item
6. (Optional) Click the “spec” icon and create a detailed spec for the order – you can ignore this if you add enough detail at steps 3 and 4.

Once these details have all been added you can print /email the purchase order as described in the previous example.

Other useful details
On the purchase order screen you can now see and/or add other useful details, on the top right hand side of the order screen:

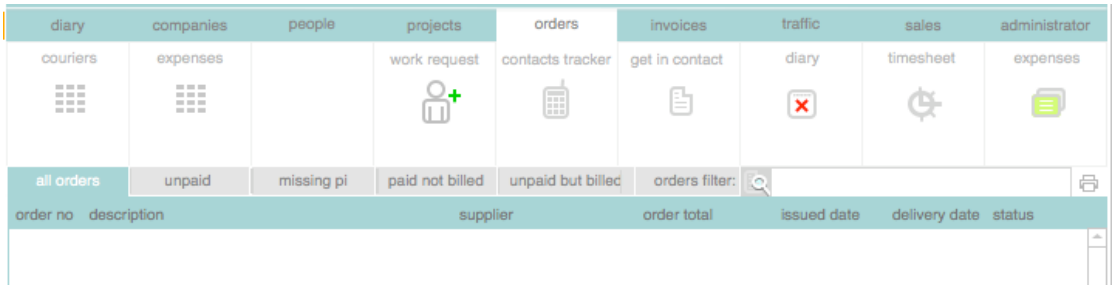
order no	16
supplier ref	pfd5564
billable status	bill
mark up	0.00%
currency	GBP
estimate status	not estimated

1. Order number: This is automatic, and cannot be amended.
2. Supplier ref: This may have been entered at the point of accepting an tender, in which case it will appear here. If nothing appears here, you are free to add a reference received from the supplier here if you wish.
3. Billable status: By default, all purchase orders are set to “bill”. Click the white box will change this to ”non-billable”. This can be very useful if the order was raised for internal costing only, and is not to be on-billed to your customer (eg for paying freelancers).
4. Mark up: If an estimated cost was imported into the order, this box shows any mark up already applied to the estimated cost. If this is wrong, or if you need to add your own, you can change this figure here. Please note you only have access to the percentage mark up here, not the margin mark up function.
5. Currency: If an estimated cost was imported into the order, this box shows currency of the estimated cost. If you are ordering something that was not estimated, you can change the currency here if required.
6. Estimate status; If an estimated cost was imported into the order, this box shows a status of “estimated” in green. If the order was made manually, it will show a status of “not estimated” in red.

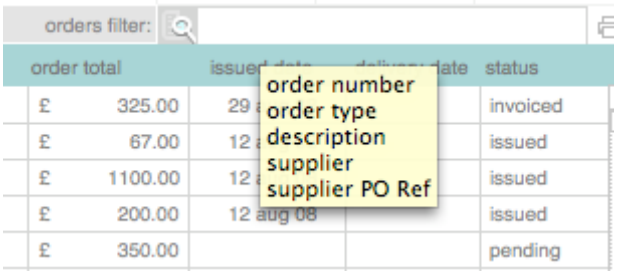
Remember that a Purchase Order can be deleted if you do not require it, by using the red “delete” button in the very bottom right hand corner of the screen.

Finding Purchase Orders

You can browse through and search for your purchase orders in the main Traffic tab called “orders”. Selecting this tab will bring up the screen displayed below:



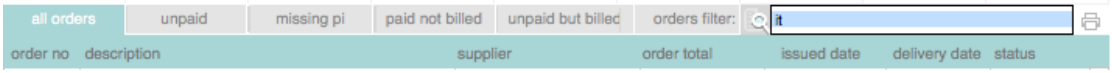
Searching for Orders
On this screen you can look at all orders in Traffic. You can use the search box on the far right of this screen to filter the results on screen – the roll-over menu gives you the available search options:



Order Number: - The Traffic PO number assigned at the point the order was made
Order Type: taken from “supplier type” if you set this on the order
Description: Whatever was typed in the description window of the order
Supplier: Supplier’s company name
Supplier PO ref: Suppliers own reference to you (if added)

Type in your search term, and click the magnifying glass (or enter key). Results will come up in a lost view underneath the find window. Click any line item to see the order.

As well as this search, the orders screen also offers other useful displays, which you can see in the tabs shown beside the find function.



These are as follows

All Orders
This is the standard view, of any search results from the find box. Note that this can be printed (use the print icon far right)

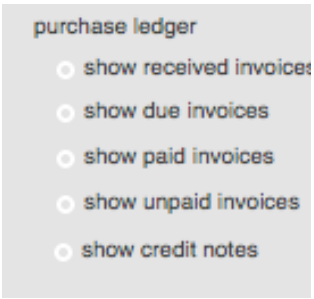
Unpaid
Shows all orders that do have a purchase invoice but no payment has been made. Use the UPDATE LIST button to refresh the screen each time you search.

Missing PI
All purchase orders that do not have a purchase invoice added. Again, use the UPDATE LIST button to refresh the screen each time you search.

Paid Not Billed
All orders that have been paid to the supplier but not yet billed to the client. Again, use the UPDATE LIST button to refresh the screen each time you search.

Unpaid But Billed
All purchase orders that have been billed to the customer but not yet paid to the supplier. Again, use the UPDATE LIST button to refresh the screen each time you search.

Remember that you can also look for purchase invoice under the "invoices" tab of Traffic too. Click on the "invoices tab and you will see a purchase ledger search on the main screen of this section (lower right corner). Here you can search for received, due, paid and unpaid supplier invoices.

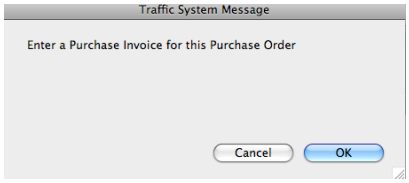


Finally, remember that purchase orders linked to any project are also listed on that project's summary page.

Adding a Purchase Invoice to a Purchase Order

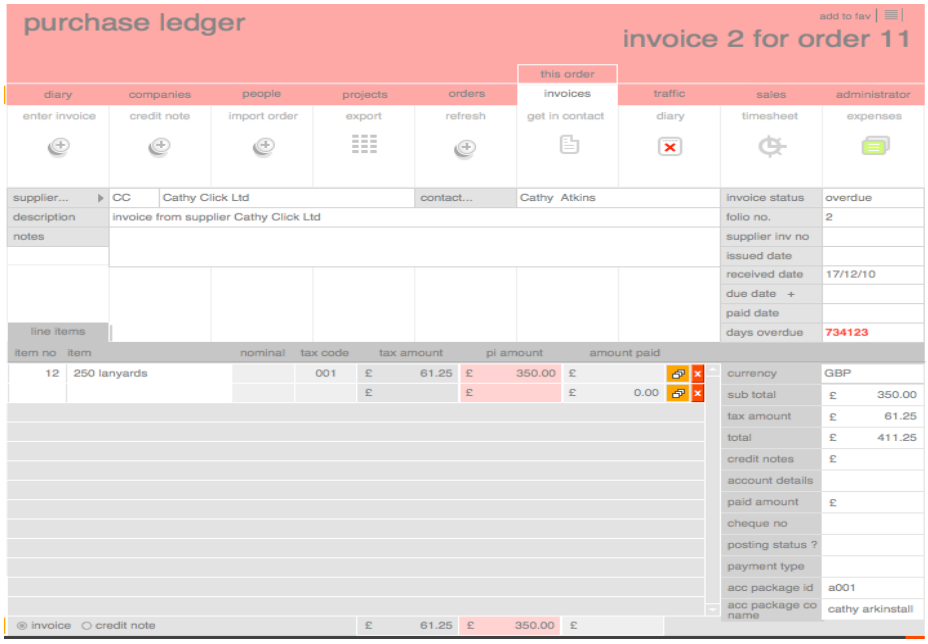
To add a supplier invoice to an ordered cost you must first go in to the relevant purchase order. Use any of the search methods listed above to locate the order.

Once in the purchase order you wish to add an invoice for click on ‘add pi’ and you will be able to add an incoming supplier invoice (pi) to the order, by clicking OK on the box that appears.



Note that if the PO is incomplete or invalid, you will see an error message come up at this point, and will not be able to add the pi until you have corrected the order or added the missing information.

If you successfully add a pi, you will be immediately be taken to this screen in your sales ledger:



Once in the purchase invoice screen, use the fields on the top right of the screen to add a supplier invoice number, add a received date, issued date and due date. The due date can be calculated by simply typing a number of days into the area to the right of the "due date" label (in our example below, we have typed "30").

The folio number is automatically generated, this is the Traffic system's own reference for the record you have added.
The invoice status is also automatic – it will change to "paid" when a payment amount is added.

invoice status	pending
folio no.	2
supplier inv no	3355554
issued date	29/12/10
received date	29/12/10
due date + 30	29/01/11
paid date	
days overdue	

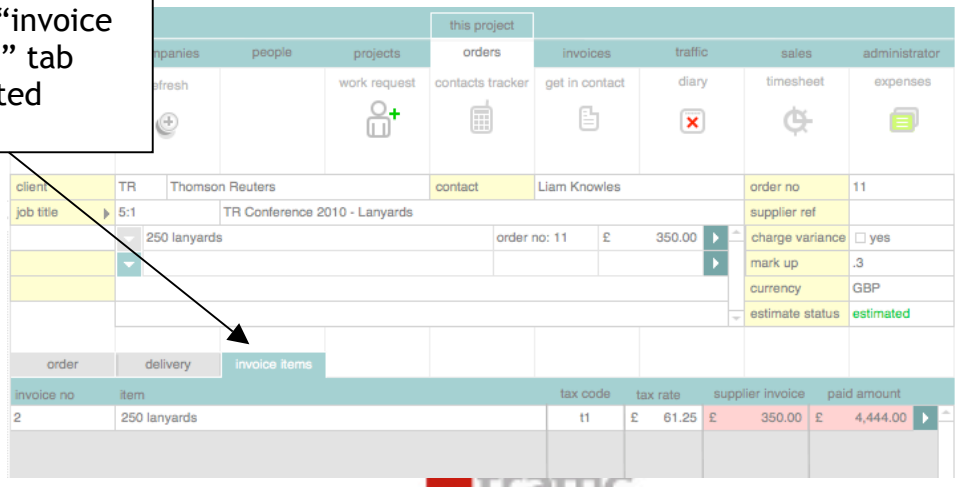
In the centre of the screen you will see all the line items brought through from the order. The line items have data fields for you to add nominal codes and the correct Tax/VAT code.

line items

job	item no	item	nominal	tax code	tax amount	pi amount	amount paid
5:1	12	250 lanyards		001	£ 61.25	£ 350.00	£
					£	£	£ 0.00

This completes the information you will need about the supplier invoice. The invoices you have added to a purchase order can be viewed at any time, by going in to the original PO and selecting 'invoice items' half way down the screen – this will show you details and numbers of the invoices you have received and if it has been marked as paid.

PO screen with "invoice items" tab selected



Adding a Payment to a Purchase Invoice

line items

item no	item	nominal	tax code	tax amount	pi amount	amount paid
6	print of 2000 brochures	6200	002	£ 0.00	£ 20,000.00	£ 20,000.00
				£	£	£ 0.00

To add a payment to a purchase invoice you must first go in to the purchase invoice . Check the tax code and nominal code (if applicable) on the line specified. You can enter a payment by simply typing the amount into the data filed marked as “amount paid”.

You can also add lines to the purchase invoice and enter new information on the line below, for example if you pay in installments. If you make a mistake you can delete the line by using the ‘x’ at the far right hand side of that record. You may also use the button to duplicate the whole line.

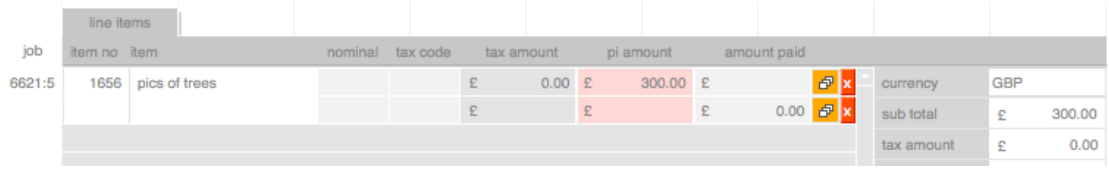
currency	GBP
sub total	£ 752.00
tax amount	£ 131.60
total	£ 883.60
credit notes	£
account details	
paid amount	£ 200.00
cheque no	
posting status ?	
payment type	

When in the invoice you are able to see a summary of invoice payment details on the bottom right hand side, including paid amount (to date), tax amount, total value due, any credit notes, etc.

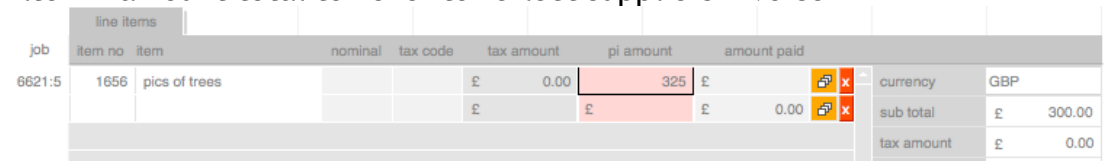
Variances

You may need to enter a PI amount that is different to the original PO amount. This will lead to a variance. To enter a variance, simply alter the amount of the value in the field called “pi amount” (it defaults to the same as the PO amount when the invoice is created but it can be edited). Once you have changed this field the system will register that there is a variance, which you will be able to see on the corresponding purchase order:

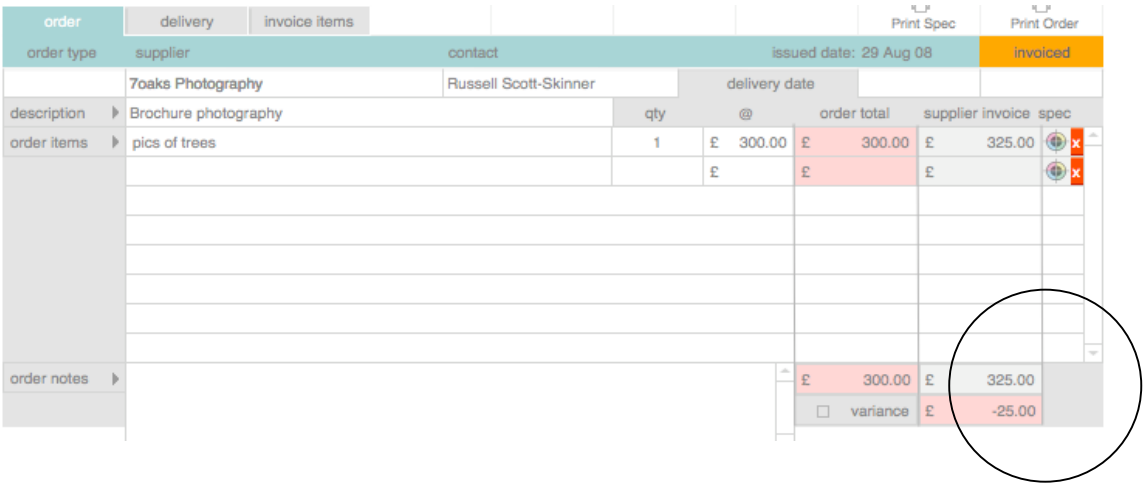
PI Created with PO amount of £300 as default



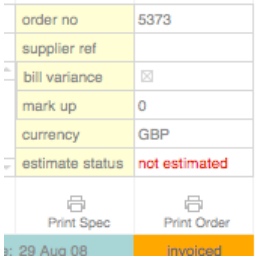
Alter PI amount total to £325 to reflect suppliers invoice



On original PO, variance of £25 is recorded



Now you can choose whether to just accept the variance or pass it on to your client. There is a check box marked “variance” beside this figure, which you can mark with an X. Doing so tells Traffic that when you come to cost capture for billing your client, you wish to pass on the variance figure instead of the original to your bill, and it will be marked up with your original mark up amount.



You can also see another check box named “bill variance” higher up on the PO screen. The two check boxes are linked, so just check one of them.

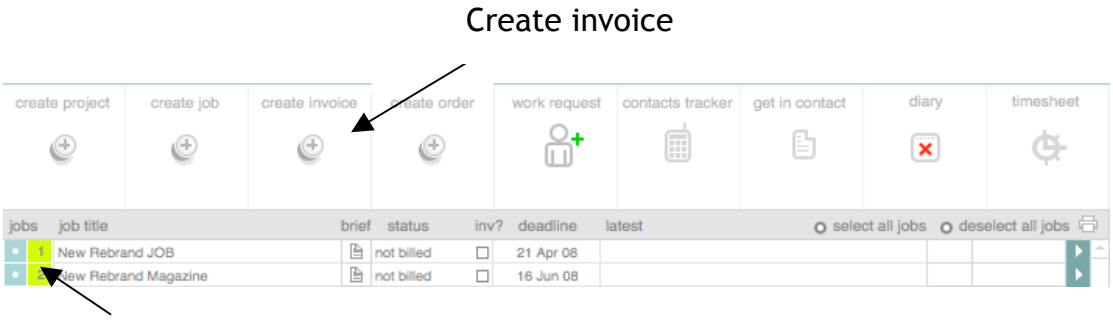
Even if you have already invoiced your client based on the PO amount before the supplier invoice arrives, you can still use the “bill variance” function. If the variance is an increase, Traffic will recognise a new unpaid amount and will allow you to invoice your client for the outstanding balance, as a separate line item.

INVOICES

Traffic can raise invoices quickly and easily. You can choose a single job, or invoice an entire project in one go. The process of raising an invoice begins with an efficient and easy summary of all billable items, which is called the cost capture. Users can make decisions about what to invoice at this stage and then convert those items into an invoice that can be issued and sent directly from Traffic.

Create a Cost Capture

To start the process of invoicing, go into the project that you wish to raise an invoice for. Invoices differ from purchase orders in that you can choose whether to invoice single jobs or the whole project. This is done in the same way as selecting a job for purchase orders. As you can see below, in this example the invoice is for the entire project, as both jobs are selected, but you can bill one selected job at a time.



To begin the invoicing process, click the ‘create invoice’ button. Confirm that you wish to proceed, and the next step is to choose a “single” or “itemised” invoice

Use these options to select whether you wish to have your job figures combined on the invoice (“single”), or whether you would like the client to see an itemised invoice listing a breakdown of all the charges they will be paying for (“itemised”).

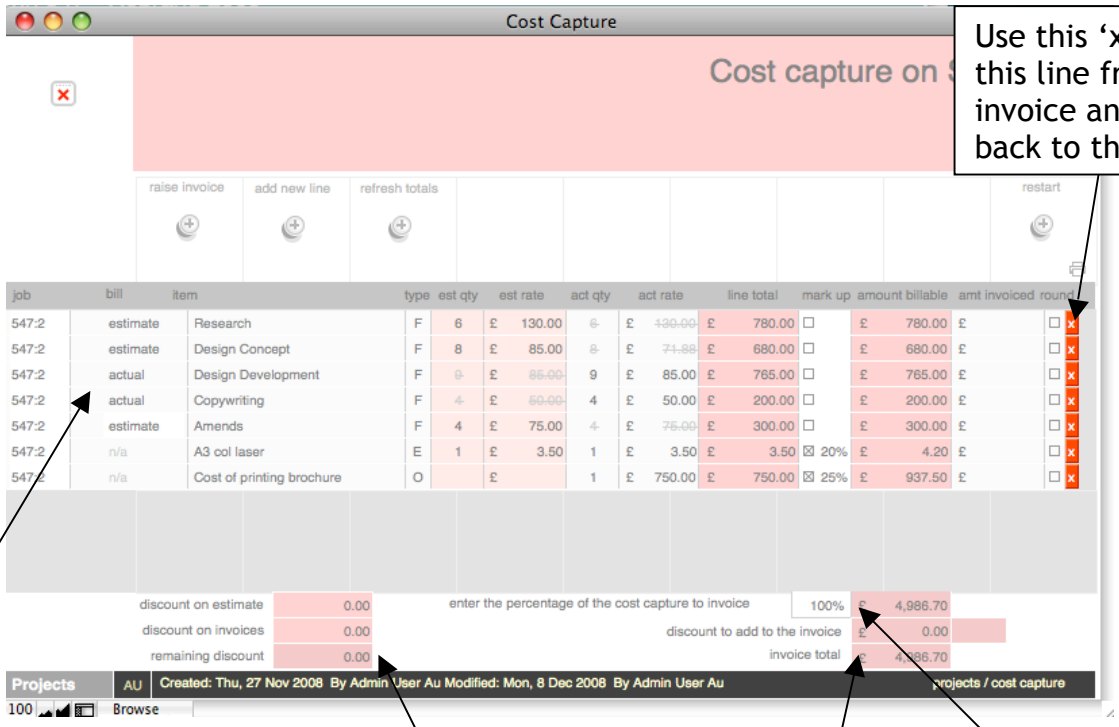
The question may come up more than once, because you can do this for 3rd Party Costs, Job Stages & Job Expenses. After selecting your preference for each of these you will be taken to the ‘cost capture’ screen.

Cost Capture
The 'cost capture' screen allows you to decide how much of the total estimate you wish to include on this invoice. You have the following options:

- Delete any lines you do not want to invoice at this stage (these will be available to invoice later).

Under "billing options",

- Change the amount to be billed from estimate to actual (if estimate is the default status of the job).
- Change the amount to be billed from actual to estimate (if actual is the default status of the job).
- Change the amount of a line to be billed to "non billable" if this stage is not to be passed on to the client for invoicing.


Cost Capture
Cost capture on
raise invoice
add new line
refresh totals
restart
job bill item type est qty est rate act qty act rate line total mark up amount billable amt invoiced
547:2 estimate Research F 6 £ 130.00 6 £ 130.00 £ 780.00 £ 780.00 £
547:2 estimate Design Concept F 8 £ 85.00 8 £ 71.88 £ 680.00 £ 680.00 £
547:2 actual Design Development F 9 £ 85.00 9 £ 85.00 £ 765.00 £ 765.00 £
547:2 actual Copywriting F 4 £ 50.00 4 £ 50.00 £ 200.00 £ 200.00 £
547:2 estimate Amends F 4 £ 75.00 4 £ 75.00 £ 300.00 £ 300.00 £
547:2 n/a A3 col laser E 1 £ 3.50 1 £ 3.50 £ 3.50 20% £ 4.20 £
547:2 n/a Cost of printing brochure O £ 1 £ 750.00 £ 750.00 25% £ 937.50 £
discount on estimate 0.00
discount on invoices 0.00
remaining discount 0.00
enter the percentage of the cost capture to invoice 100% £ 4,986.70
discount to add to the invoice £ 0.00
invoice total £ 4,986.70
Projects AU Created: Thu, 27 Nov 2008 By Admin User Au Modified: Mon, 8 Dec 2008 By Admin User Au projects / cost capture
100 Browse

Use this 'x' to remov this line from the invoice and send it back to the estimate

Options to change billable amounts from "estimate" to "actual" or "non billable"

Shows any estimated discount and information on the value of discount applied to date.
To apply a discount use either of the (£ or %) discount fields above the invoice total.

Use this to create a % invoice of the cost capture amounts.

About "non-billable"
If you use the ignore function, you can effectively mark a stage (or remaining unbilled amounts on a stage) as not to be billed, or written off. This has the same effect as using the "do not bill" check box on the project summary screen (see section on "Monitoring Active Work"). It will stop the unbillable stage from going through to the invoice, and is useful if you know a stage has over-run and this extra amount cannot be billed, or if a whole stage is not going to be billed at all. It's also good for expenses and purchase orders that you think should not be on-billed.

Marking the stages as "non-billable" will influence billing status of a job, too. So for example if all outstanding stages were marked in this way, the status of the job would change from "part-billed" to 'billed".

Finally, line items marked as "non-billable" will not transfer to the invoice that the client receives, so if you are intending to show line items as not charged (so the client can see what value they have saved, for example), leave the line item as it is and discount that line to zero on the final invoice – this is explained in next section.

Mark Up
Allows you to mark up the value of this line as a percentage at the point of invoicing and will also allow you to see the percentage mark up already applied to any line from the estimate details. Normally applies to expenses and 3rd party cost, but mark up is available for stages as well if you wish to use it.

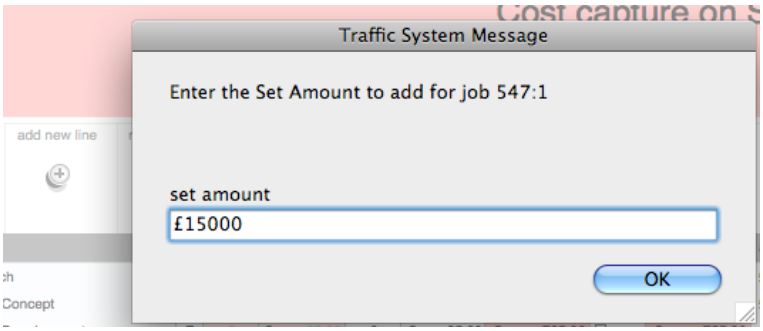
Remove stages
You can delete any line items from the cost capture that you don't wish to include on your invoice. Lines removed from cost capture will be retained as uninvoiced amounts in the job, and they can be invoiced at a later date, or not invoiced at all. Remember that these items will come back again as billable the next time you do a cost capture – use the "non billable" option if you wish to mark them as permanently non-billable.

Percentage bill
Use the percentage function to raise an invoice for a set percentage of all line items in the cost capture. You can choose onay of the present value or free type a percentage of your own choice (write as a decimal figure, eg. 25% is typed as 0.25). The next time you create an invoice for the same job, the remaining percentage amounts will be billable again. You can only apply the same percentage change to the whole cost capture.

Round
Allows you to round up individual line costs to the nearest whole number (ie to the nearest pound).

Amount Invoiced
Shows you any amount already invoiced on each line. This will show if any line has been part or percentage billed already. Lines that have previously been fully invoiced will also show on this screen with a billable value of "£0.00". These lines will not appear on the invoice you are about to create.

Add New Line
Will allow you to add a new line to the invoice. Use this function if you wish to create a line item that you decide on yourself, irrespective of job figures.



If the cost capture contains more than one job, selct one of them by using the grey highlight button on the far left of one of the items.

The system does not backwards allocate items added using this function to any stage or cost on the estimate, so you need to be aware that all other amounts on the job will remain billable to full value, whatever you type in here. Reports will show this amount, but not which part of the job this amount is attributed to.

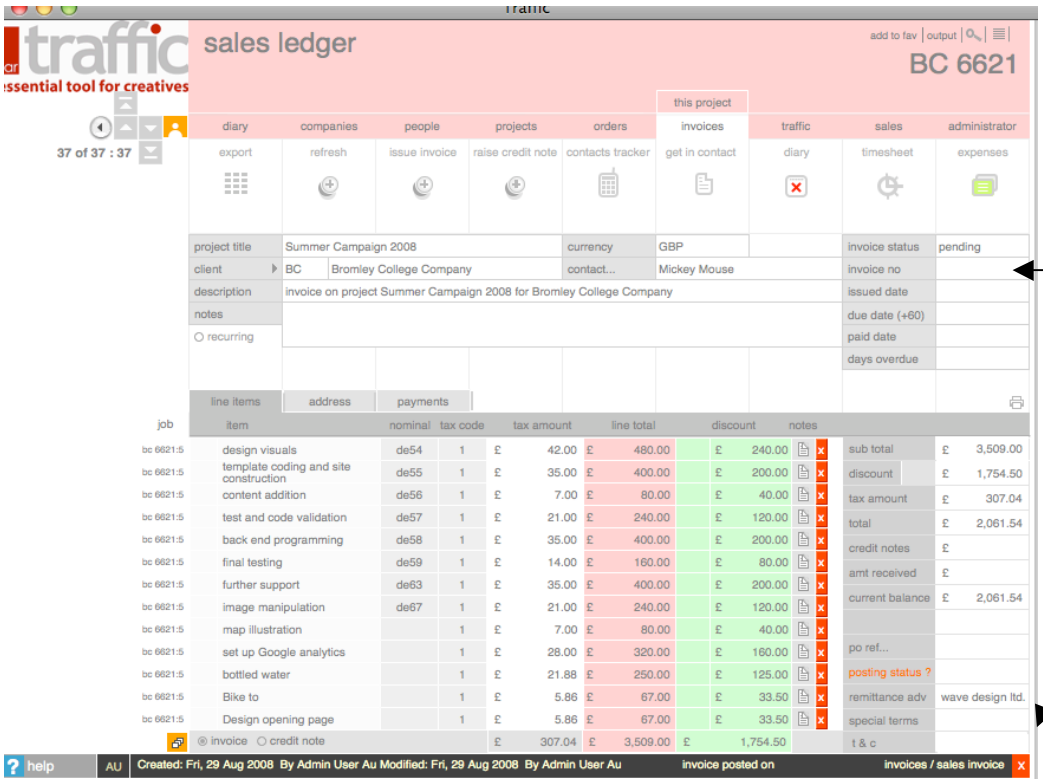
Refresh Totals
Use refresh to check cost totals after you have made amendments to the cost captured.

Restart
Will allow you to restart from the 'Create Invoice' point. For example selecting whether you would like to bill actual, bill estimate and so on. If you don't wish to raise an invoice at all at this time, you can also remove all line items from the screen by clicking the red "X: button for every line, and close the cost capture window.

Print Icon
Print a copy of the cost capture screen (this is not an invoice).

Create Invoice based on your Cost Capture
Once you are satisfied with the amounts on the cost capture screen, click the {“create invoice” plus button. This will then convert the line items on the cost capture screen into a pending invoice. Allow the system a few seconds to transfer the amounts into the new screen in Traffic.

The Sales Ledger Screen
Once you have raised the invoice you are taken to the Sales Ledger screen of Traffic, and your cost capture is converted into a pending invoice (shown below). Pending invoices can be deleted at any time, so if a mistake has been made you can still delete the entire invoice at this stage, and all amounts will be returned to the job area to be billed again. The invoice can remain in pending status (with no number or date) indefinitely, or up until the point it is issued.

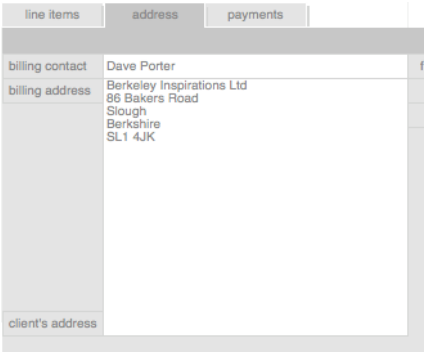


Checking your Pending invoice

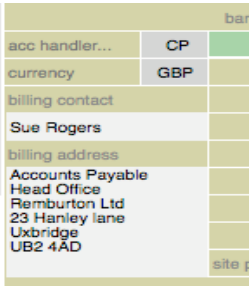
There are various things that you may now wish to check before issuing the invoice.

Address

You can check (and amend if needs be) your billing address, by clicking the "address" tab just above the line items area:



The address tab allows you to over write the company address if you wish to send this invoice to someone other than the client project contact. There are two settings in the system to help you alter this.



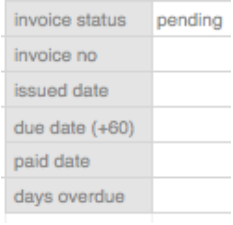
Billing address

Each company record has an area called "billing address" under the "accounts" tab, where you can store a billing name and address that may differ from the project contact address. This will be used on all invoices if filled in.

Change contact

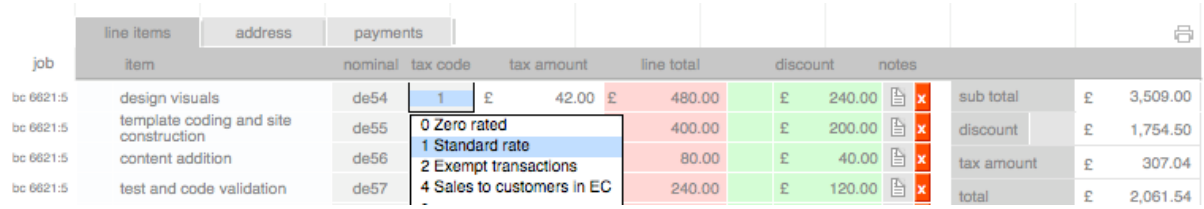
You can click on the "contact…" button on the main invoice screen to choose a different person at the client company to be the named recipient of the invoice. This does not change the address.

Check/ alter invoice terms



The box marked "due date" will show your default payment terms for all invoices (as set in Administrator). You can override this for any individual invoice by typing a number just beside the small "+" sign (here we have put 60 days), or you can store a company setting for payment terms in the Company record, which will over-ride the default for all of that company's invoices.

Tax amounts
You can alter the tax codes for each line item on the invoice. Usually these are set as defaults when the job is created, but if these are blank (or need changing) you can do so on this screen.



Nominal codes
Here you can type (or select from a drop down if added in Administrator) any nominal or departmental codes that you wish to use. This only has an effect on systems that are set up to integrate with another accounts software package. As Sohnar Support for more details on this.

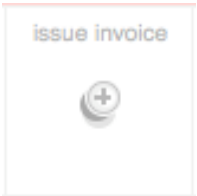
Issue Invoice by print-email option

Click the printer icon to preview the invoice before printing, emailing and issuing it. You can choose to preview, print or email BEFORE you issue the invoice if you wish. With the invoice open in edit mode, the steps to follow are as follows:

1. Click “print option” at top of layout screen.
2. Choose letterhead, yes or no.
3. Choose yes or no when prompted: “Do you wish to issue this invoice now?”
4. Print or email your invoice.

Remember that as with other documents, printing and/or emailing an invoice creates and saves a PDF of the document in Traffic, as well as a contact record, in the case of the email. An invoice can only be issued once, but an issued invoice can be printed or emailed multiple times.

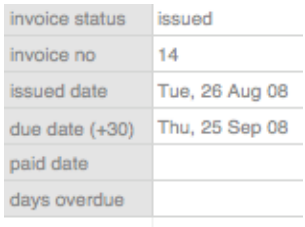
Issue invoice WITHOUT preview



To issue the invoice to your client without previewing, you can go in to the invoice and select ‘issue invoice’ at the top of the screen. You will then be prompted to print or email the invoice.
We recommend this is method is not used unless you have previously checked the PDF!

At the point of emailing or printing the invoice, it will be given an invoice number, issue date and payment due date.

Altering the Invoice Date



It is possible to alter the date of issue before or after you issue it. Simply overtype the "issued date" and the due date will change accordingly. You can then print or email a copy to your client. If the invoice is pending, simply type in your own choice of issued date before issuing it, and this date will be retained. Pending invoices with no manually added date will be assigned the current date at the point of issuing. Note that if you add a date and it is wrong, it is NOT possible to revert the field to being blank again, so be sure to correct it before sending.

Note also that the due date is calculated automatically (based on the payment terms).

CAN YOU DELETE AN ISSUED INVOICE?

The simple answer to this is no. No matter what level of access you have to Traffic, no users can delete an issued invoice. Contact Sohnar Support if you need to do this, but be aware that it involves losing the numbered invoice permanently from the system. We can do this on your behalf, but we recommend that you raise a credit note instead.

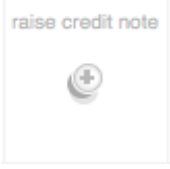
Raising & Issuing a Credit Note

Raising a credit note in Traffic is easy. All you need to do is locate the original invoice, and the function to create a credit note is little more than a few clicks.

Invoices are searchable in three basic places:

1. Project Summary screen
2. From Companies area, invoices tab
3. From main Invoices tab in Traffic

(Searching for invoices is explained in more detail in the next section)

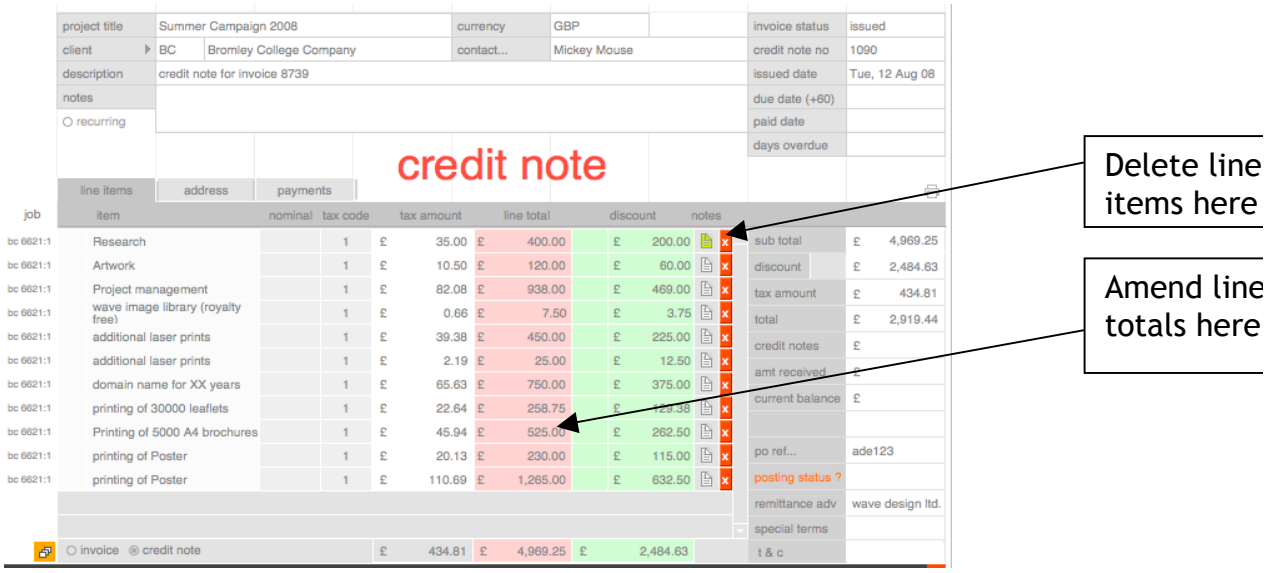


When you have located your invoice and have it onscreen in front of you, select 'raise credit note' from the top of the screen, and Traffic will produce a credit note - in pending status - for that invoice. The words "credit note" will be displayed in large red writing in the middle of the screen.

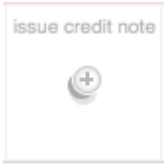
You can now just issue the Credit Note as it stands (an exact copy of the original invoice), or you could make it a partial credit.

To part credit, delete the lines that you ***do not*** wish to credit using the 'X' on the right hand side of each line.

You can even part credit just one line by amending the amount in the pink total box (under the header of "line total")



Once you are happy with the content select 'issue credit note' at the top of screen. The credit note can be printed and sent like a normal invoice if you need to.



Any invoice or line items from an invoice that are credited will be returned to the job as uninvoiced amounts, from where you can potentially bill them again.

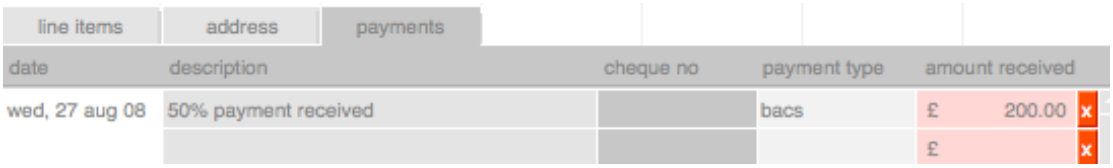
Be aware that by raising a credit note you will affect the billing status of the job

Adding a Payment to a Sales Invoice

Traffic invoices will stay as issued until you fill in details of payments made. You cannot manually alter the status of an invoice, so if you want to change an invoice to “paid” status, you must enter in the payments to meet the total amount of the invoice issued, and then the status will change automatically from issued to paid.

Access your invoice via the project, the ledger or through the invoices tab of the project page.

Once in the invoice select ‘payments’. Select the payment date, free type a payment description, type a cheque number (if applicable) and type the amount received. You must also enter the “paid date” into BOTH the line item (left hand side) and the “paid date” window at the upper right hand side of the invoice screen.



You are able to add further payments by clicking in the line below and/or delete payment lines (if you make a mistake) by selecting the ‘X’ on the far right of each line.

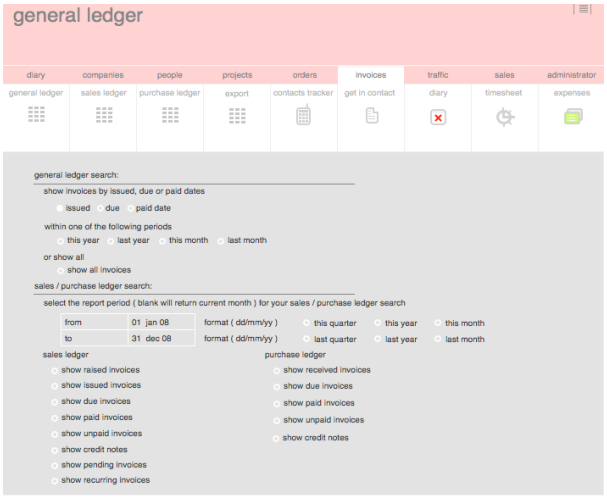
While you are adding lines of payment that do not reach the full invoiced amount, the status of the invoice will show as “part paid”. When you add payments that reach the total of the invoice, the status will change to “paid”.

Finding Invoices

There are basically three places you can find invpices in Traffic

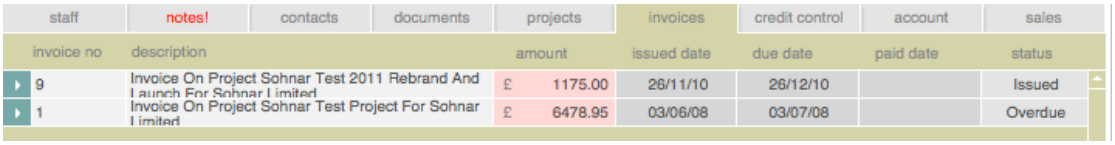
1. **The invoices tab**

Invoices are not raised in this area, but it allows you to search through all invoices in the system. This screen allows you to search for all invoices, or choose from Sales Ledger or Purchase Ledger before you search. Searches can be done by date range, status and invoice types.



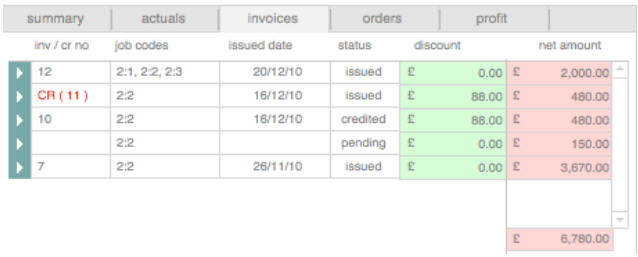
2. **The companies area**

Find any client in companies, and all invoices for this company can be found under the invoices tab



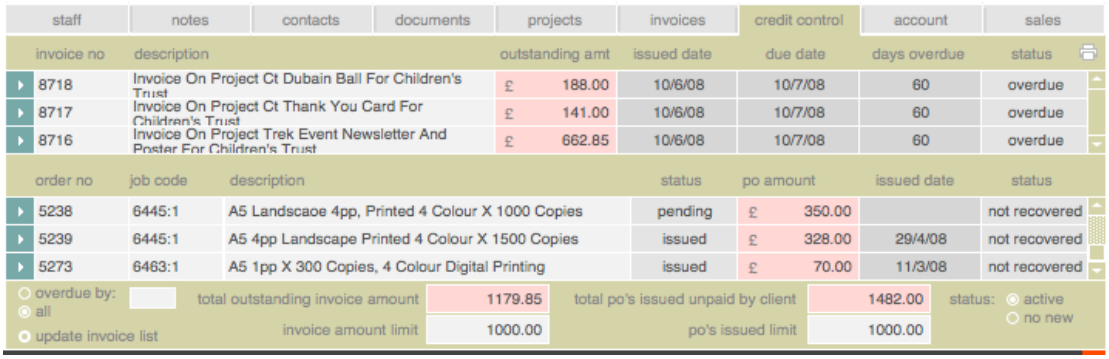
3. **The projects summary screen**

Click the blue link at the bottom right corner of the project summary screen marked "invoices" to see a list of all related invoices in the centre of the screen:



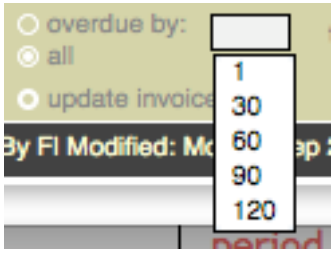
Credit Control

Under each company record is a tab called “credit control”. This area lets you track due invoices and unpaid purchase orders for clients.

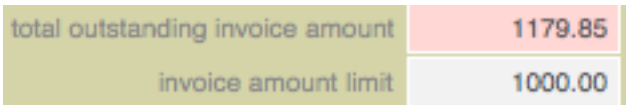


In this section you can view unpaid invoices and unrecovered purchase orders.

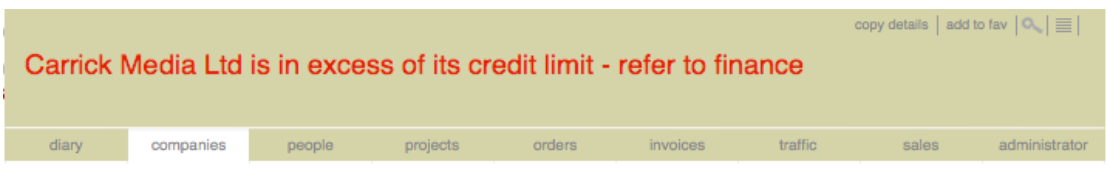
On the left of the screen are two buttons marked “overdue by” and “all” The “overdue by” function has a field for you to choose the time period that you wish to see all unpaid invoices for. Choose 1 day to see all issued invoices, otherwise choose a longer time period to see just those that have exceeded the agreed payment terms. You can also choose “all” to see all issued invoices.



Once the invoices are displayed, you will see a value in the “total outstanding invoice amount” field. Under this window is a field where you can enter your own credit limit for that company. In our example we have set a credit limit of £1000.

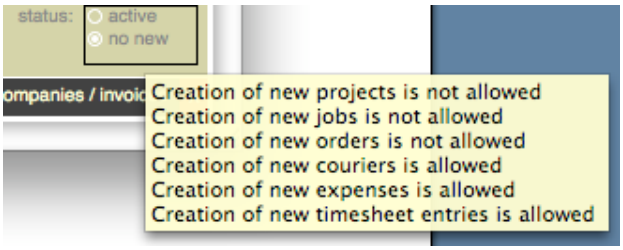


If you set a figure here and the outstanding amount exceeds this figure, a red message will now appear at the top of the company record and on all projects for that client. The message will look like this:



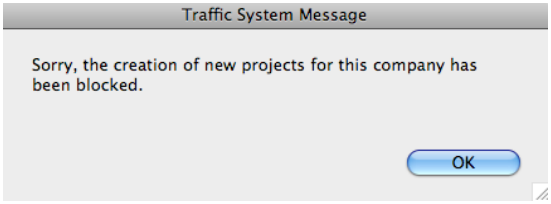
This message should act as an alert to all Traffic users, but it has no impact on the system other than that. You can however choose to block certain Traffic functions for clients who exceed their credit limit by using the "status" function on the right of the credit control tab.

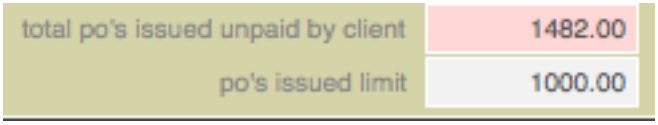
This function is set to "active" as default, but you can choose to set it to "no new" if you wish, by clicking on this button. "No new" prohibits several functions in Traffic that relate to that client. A roll-over menu will tell you what functions are prohibited when "no new" is selected:


status:
active
no new
Creation of new projects is not allowed
Creation of new jobs is not allowed
Creation of new orders is not allowed
Creation of new couriers is allowed
Creation of new expenses is allowed
Creation of new timesheet entries is allowed

If you try and create a project for a client marked in this way, you will not be able to, and the following box will pop up when you try:

A similar procedure can also be carried out for purchase orders for clients. All unpaid purchase orders can be seen under the credit control tab at all times (there is no need to run a search by credit terms). At the bottom of the screen is another total field for the amount of orders unpaid by the client, and again, another field for you to store a PO limit.

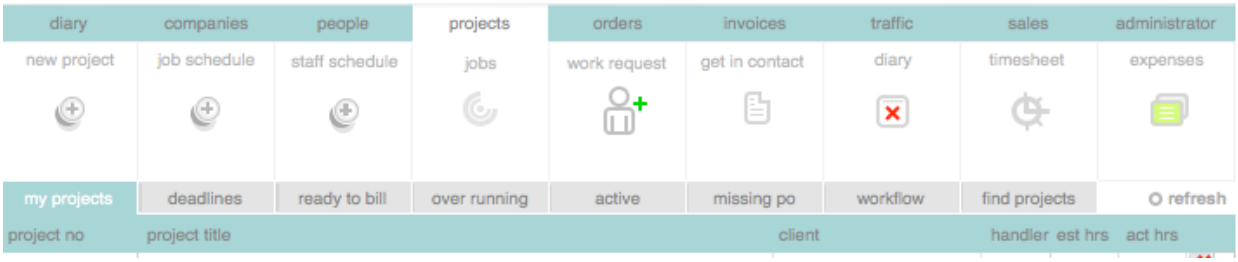




As with invoices, you can enter a PO limit here and if this is exceeded, the red warning message will appear at the top of the company record and projects as before. Items will appear in this section as long as soon as they are ordered, and will disappear from this list once they are invoiced AND paid for by the client.
The "no new" function can be switched off at any time by clicking the button back to "active" again, which will remove the warning messages.

FINDING PROJECTS

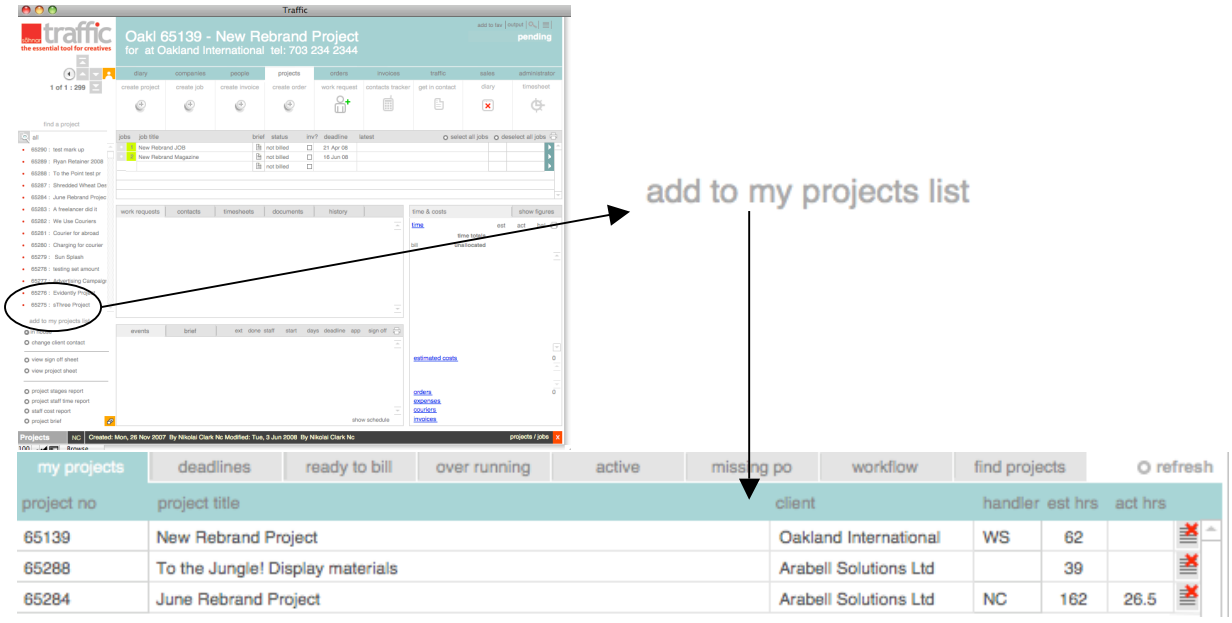
On the main “Projects” tab, there are several tabs that can help you see a full overview of current work within your business.



This section will deal with each of these tabs in turn.

My Projects

This section allows you to add quick shortcuts to any project you wish to look at frequently. Links on this tab are manually added by clicking the link called “add to my projects list” which is on the lower left of all project summary screens.

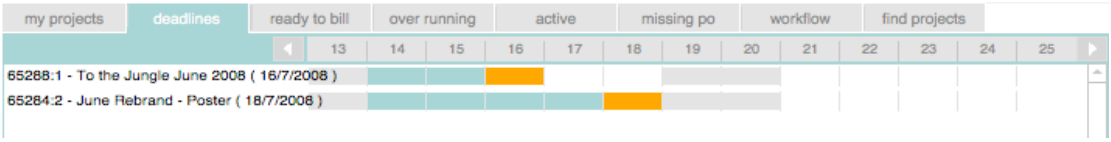


Use this function often to keep the projects you are most interested in within easy reach. Once you add a project to this list, simply click on the name to go to that project screen. Use the “refresh” button to make sure any project name changes get updated on this list. Keep the list useful by

deleting bookmarks to projects you don't need to look at regularly any more. The red "x" button at the right of each line will delete the bookmark.

Deadlines

Shows any job that has a deadline coming up within the next 14 days.



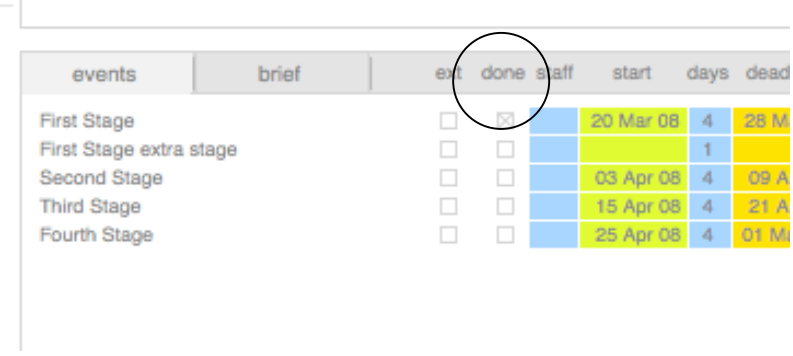
Ready To Bill

This tab allows you to look through your work in progress and see where billing opportunities are. A full explanation on this appears in the following section.

In the Project and Jobs area, you can use two functions

The Done Button

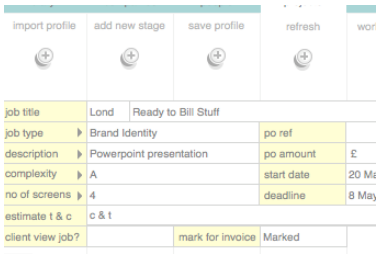
On the Project Summary screen, the done button has a very simple function – it leaves a history note saying that the stage is completed. It has no effect on finances, but it does remove stages and tasks marked as "done" from diaries and the job schedule.



The Inv button

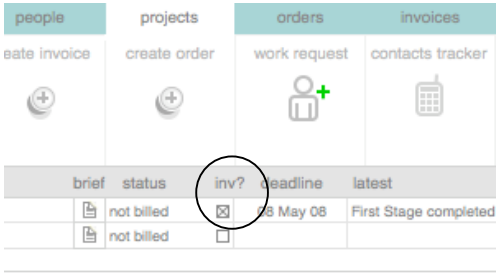
This button appears in 3 places but it is the same button and has the same effect whichever place you press it.

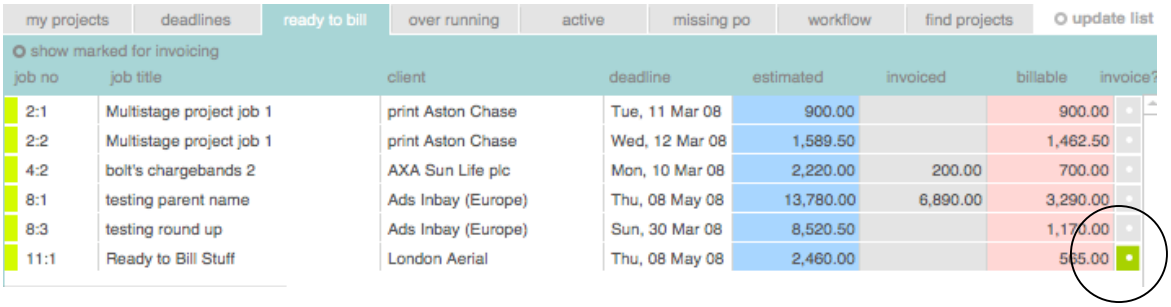
At Job level, where it says "mark for invoice" under the job type description



At Project level where it says “inv” on the job line.

On the main projects screen, in ready to bill, where it is a green square.



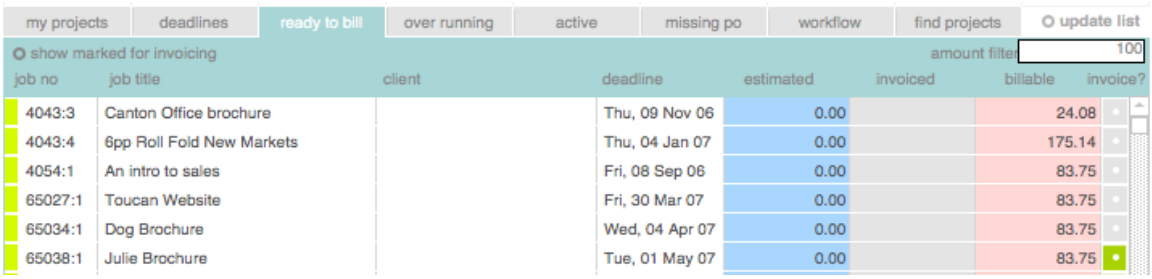

my projects
deadlines
ready to bill
over running
active
missing po
workflow
find projects
update list
show marked for invoicing
job no
job title
client
deadline
estimated
invoiced
billable
invoice?
2:1 Multistage project job 1 print Aston Chase Tue, 11 Mar 08 900.00 900.00
2:2 Multistage project job 1 print Aston Chase Wed, 12 Mar 08 1,589.50 1,462.50
4:2 bolt's chargebands 2 AXA Sun Life plc Mon, 10 Mar 08 2,220.00 200.00 700.00
8:1 testing parent name Ads Inbay (Europe) Thu, 08 May 08 13,780.00 6,890.00 3,290.00
8:3 testing round up Ads Inbay (Europe) Sun, 30 Mar 08 8,520.50 1,17[illegible].00
11:1 Ready to Bill Stuff London Aerial Thu, 08 May 08 2,460.00 [illegible]5.00

The “mark to invoice” button is used to authorise a job for billing. There is an area in the new ready to bill tab that will list all jobs marked in this way, which is to help Traffic users pass on information, for example a project manager might mark a job for invoicing so that an accounts manager can look in the Marked for Invoicing screen and see what invoices should be raised.

This is displayed when you click on the “show marked for invoicing” radio button, but first we will look at the standard “ready to bill” section.

Ready To Bill

The Ready to Bill tab will show you all jobs that have any stages with time logged on them, as well as any purchase orders and/or expenses.



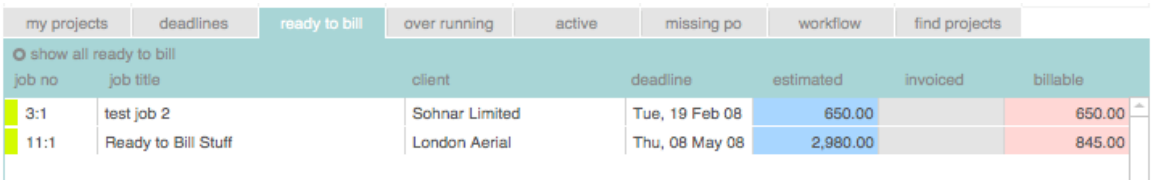
How it works:
On this screen, any hour of work, any expense incurred, and any cost will all be listed – as long as the cost has a purchase order.

Each time you view this tab you should click “update” to make sure it has all the latest amounts displayed. Doing this has no effect on job or billing status.

You can also choose what minimum amount you wish to see results for on the screen. Fill in a value in the box on the right of the screen labelled “amount filter” for example if you type in 100, only unbilled amounts over £100 will be displayed.

What can you do with this information?
Go straight to cost capture by clicking on the line item. You will be able to immediately raise an invoice in the normal way
Mark the job as “invoice” with the green square. This will make it show up in the ”marked for invoice” search here. You should do this if you wish to make a formal decision that the job you can see listed here should be billed.
Nothing – remember this screen can be for information only.

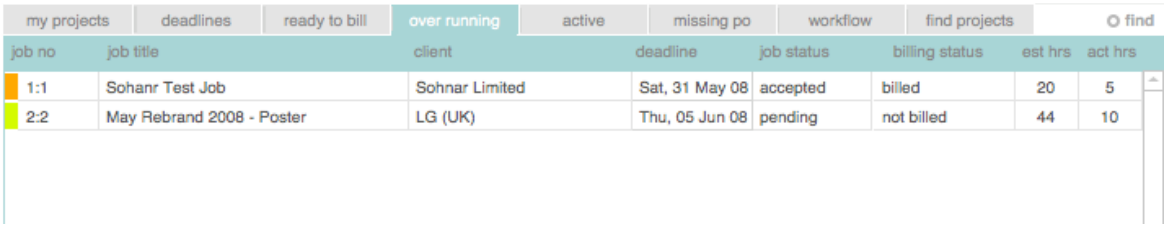
The “marked for invoice” option



When you click on this view, only jobs marked for billing are shown. This could include jobs with hours or job with no hours, because jobs listed here have been hand picked. Again you can click on any job shown here and go straight to cost capture.

Over-running

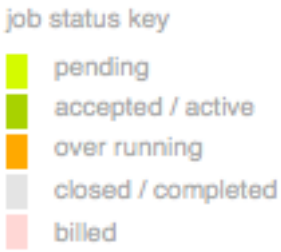
Shows all jobs in which any single stage has had more hours logged against it than was originally estimated. You need to click the radio button marked “update” on the top right of this area to refresh and update the screen. The whole job may not have over run, but Traffic gives you the earliest possible warning that there is an over-run somewhere in it. The colour on the left is to show status.



Active

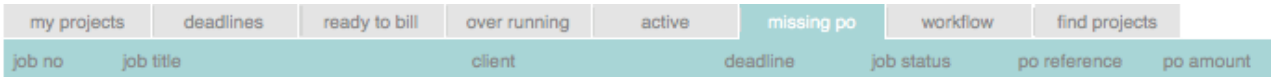
Shows all current jobs (pending and accepted) with a brief summary of the activity in them. The colour on the left of each row is to show status.

job no	job title	client	deadline	job status	billing status	est h
1:1	Sohanr Test Job	Sohnar Limited	Sat, 31 May 08	accepted	billed	20
2:1	May Rebrand 2008 - Brochure	LG (UK)		pending	not billed	13.5
2:2	May Rebrand 2008 - Poster	LG (UK)	Thu, 05 Jun 08	pending	not billed	44
2:3	May Rebrand 2008 - Flyer	LG (UK)		pending	not billed	
3:1	Crown 2008 - Hair Staighteners	HI Group Ltd	Thu, 29 May 08	pending	not billed	4
4:1	Documentation brochure	HTC (Slough)	Fri, 20 Jun 08	accepted	work in progress	63
6:1	2008 Retainer May	Sohnar Limited		pending	not billed	9



Missing PO

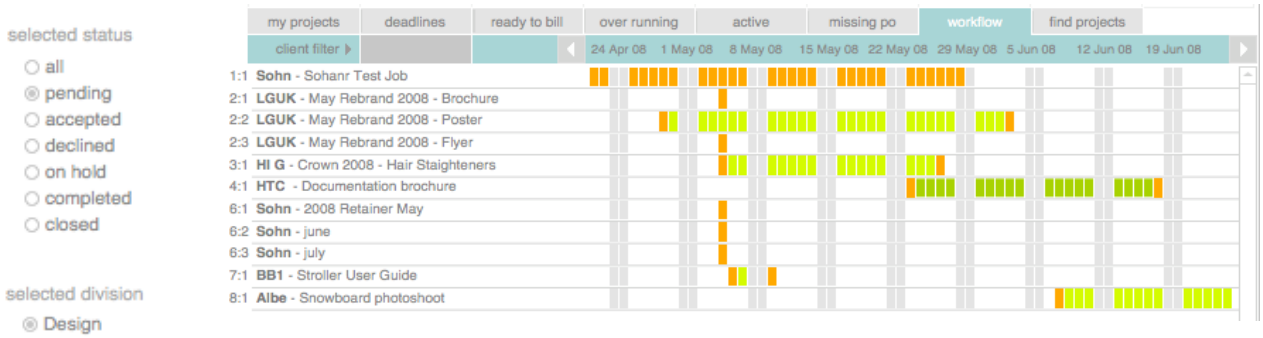
Shows any jobs where the fields for PO amount and PO reference fields are both empty. Use this screen if it is important to your business that every job has a PO from the client. Jobs where both these fields are filled in will disappear from this screen. (Note that if only one field is filled in, it will still appear here). The colour on the left of each line shows job status.



job no	job title	client	deadline	job status	po reference	po amount
1:1	Sohanr Test Job	Sohnar Limited	Sat, 31 May 08	accepted		
2:1	May Rebrand 2008 - Brochure	LG (UK)		pending		
2:3	May Rebrand 2008 - Flyer	LG (UK)		pending		
4:1	Documentation brochure	HTC (Slough)	Fri, 20 Jun 08	accepted		
6:1	2008 Retainer May	Sohnar Limited		pending		1,000
6:2	june	Sohnar Limited		pending		

Workflow

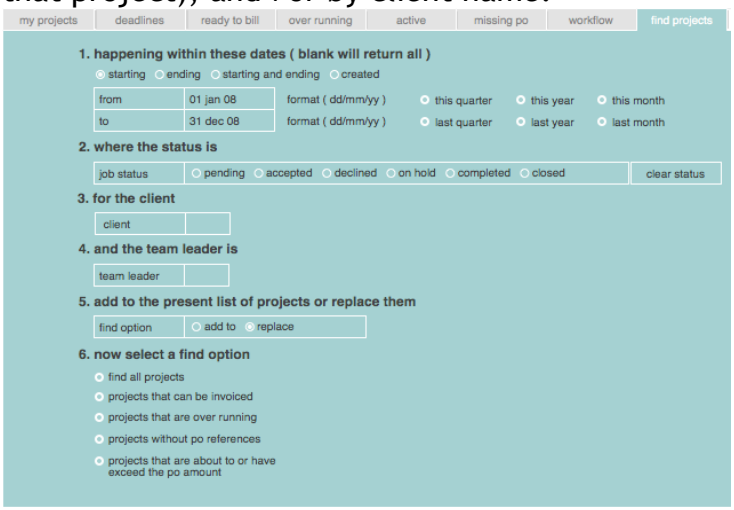
This chart shows all scheduled jobs in the business on a single screen. Each job has a single bar across the screen, starting from the job start date and ending on the job deadline date. You can adjust the dates displayed at the top of the screen by moving the arrows beside the date range left or right



You can also filter this list by client, by entering a client name in the “client filter” field. On this chart you can also choose to filter the results by job status, and by division, by using the radio buttons on the left of the screen.

Find Projects

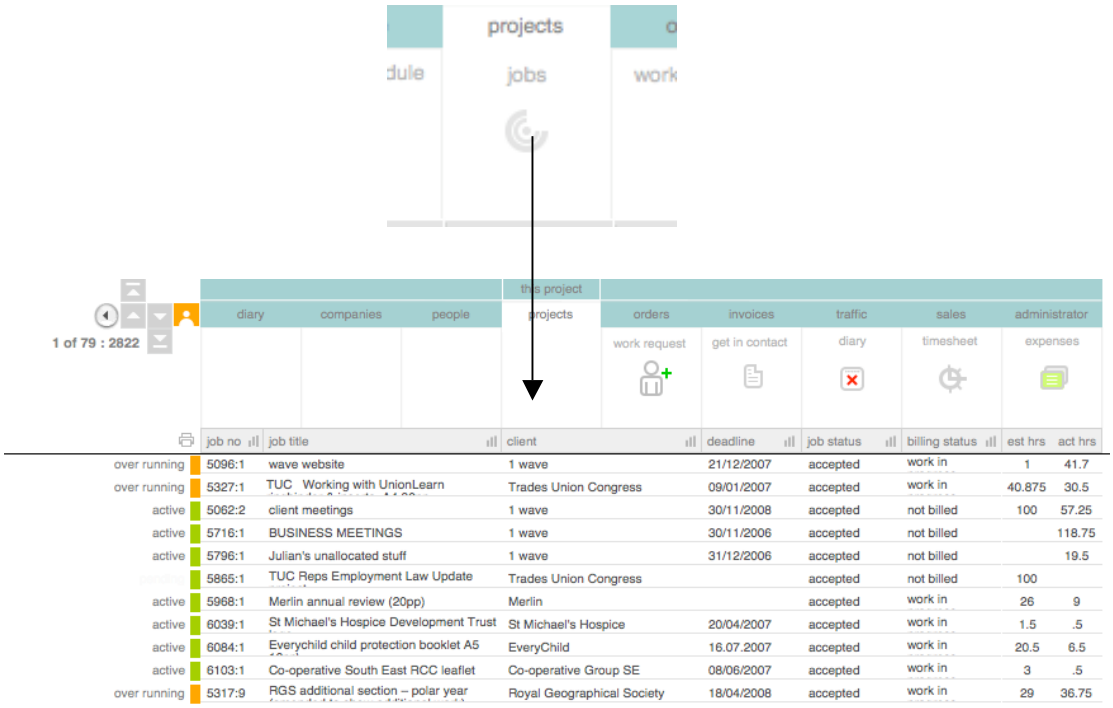
This screen allows you to run a detailed project search. You can search within a chosen date range, and filter your search by status (this is job status within a project), by team leader (whoever is the account handler for that project), and /or by client name.



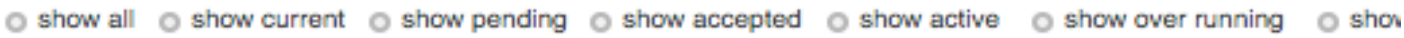
After setting your search criteria, choose to see all projects or one of the other options at the bottom of the screen. Results are displayed on screen, and can also be printed as a report.

Finding and overviewing Jobs

There is another search option on the projects home page, which allows you to search for jobs rather than projects. It can be accessed by clicking the Jobs icon which is directly under the projects tab itself.


projects
jobs
this project
diary
companies
people
projects
orders
invoices
traffic
sales
administrator
work request
get in contact
diary
timesheet
expenses
1 of 79 : 2822
job no
job title
client
deadline
job status
billing status
est hrs
act hrs
over running 5096:1 wave website 1 wave 21/12/2007 accepted work in 1 41.7
over running 5327:1 TUC Working with UnionLearn Trades Union Congress 09/01/2007 accepted work in 40.875 30.5
active 5062:2 client meetings 1 wave 30/11/2008 accepted not billed 100 57.25
active 5716:1 BUSINESS MEETINGS 1 wave 30/11/2006 accepted not billed 118.75
active 5796:1 Julian's unallocated stuff 1 wave 31/12/2006 accepted not billed 19.5
5865:1 TUC Reps Employment Law Update Trades Union Congress accepted not billed 100
active 5968:1 Merlin annual review (20pp) Merlin accepted work in 26 9
active 6039:1 St Michael's Hospice Development Trust St Michael's Hospice 20/04/2007 accepted work in 1.5 .5
active 6084:1 Everychild child protection booklet A5 EveryChild 16.07.2007 accepted work in 20.5 6.5
active 6103:1 Co-operative South East RCC leaflet Co-operative Group SE 08/06/2007 accepted work in 3 .5
over running 5317:9 RGS additional section – polar year Royal Geographical Society 18/04/2008 accepted work in 29 36.75

This screen shows you all jobs in the system, with further details like status, deadline date etc. You can also filter results on this screen, using the radio buttons along the bottom. Clicking these will show different results.



When the results are on the screen you can also sort them by any column, by clicking on any one of the graph icons above the columns.

COURIERS

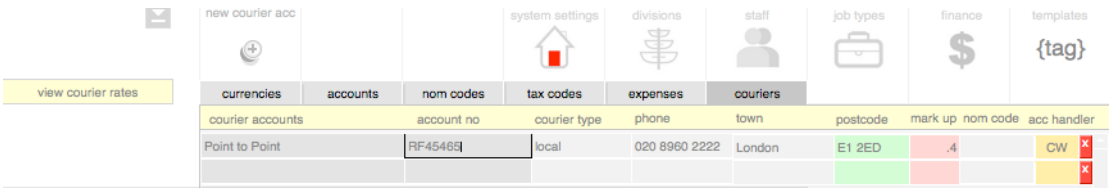
Courier costs can be added to jobs as an expense type, but you can also set up courier companies in Traffic. This way you can manage all your courier costs for each job and have the ability to match orders to courier invoices each time you receive one. The courier system allows you to match several orders for couriers to a single courier invoice. Please note that you cannot add courier orders to an ESTIMATE.

Setting up Couriers in Companies

The Couriers area allows you to add rates for your courier companies. This can only be filled in if you have a company set up as a courier in Traffic. To do this, simply enter the company details as normal, mark them as a supplier, and set the supplier type field as “courier”. This setting is important otherwise you won’t be able to do the next step of creating accounts

Creating Courier accounts in Administrator

In the Administrator area, click on the “finance” icon at the top of the screen, and then click the “couriers” tab.
Next click on the plus button marked “New Courier Acc”.
A pop up window will present you with the names of all companies set up as “couriers”. Click on the name of the company you wish to select.
A new line will be created in the courier area, and you can enter account number details in here. Other details will come through from the company record if they have been filled in.



Now you need to create some service options for this courier.

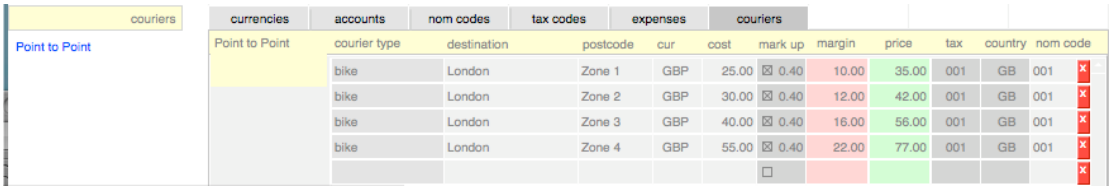
Click on the yellow box on the far left marked “view courier rates”.
Couriers with created accounts will be now listed in blue on the left hand side of the new screen. Highlight the name of the one you wish to create rates for to begin using the rates area.

First enter a description on the service they offer under the “courier type” header. Normally this would be something like “Van” or “Bike”. This term will be used later when you wish to add a courier order to a job. Other suggestions might be “Same Day” or “Next day”

Now fill in the destination and postcode fields with the commonly used destinations that you use this courier for. Examples might be “City Centre/ Zone 1” or “City Name/Postcode.

Note: Only the second field “postcode” will be visible when you order a courier at the job screen so make sure this information is suitable. You do not have to write a postcode in here if you would prefer to have a different term displayed. This can be anything, such as “Inner City Zone 1”, “Express Service”, “up to 200gms” or anything that you like.

For each destination listed, enter the price this courier charges for that trip. You can also use the mark up option here to calculate the amount that will be billed to your clients.



Enter as many rate lines as you need, and then create more line items for other courier types if needed. Repeat these steps for all the different courier companies you wish to use.

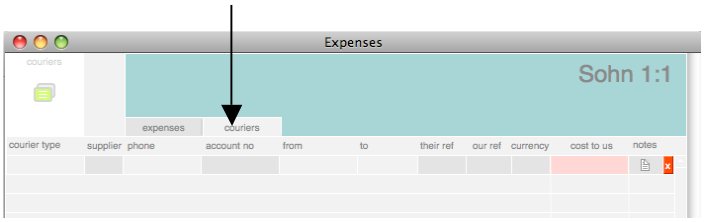
Note: You can still use the Courier option even if you do not enter any figures in the fields, as the price can be entered manually at time of order.

Adding courier costs to jobs

Now you can enter courier costs against jobs by using these details rather than just having “courier” as a generic expense type. Courier costs are entered by using the “expenses” icon that appears on most Traffic screens.

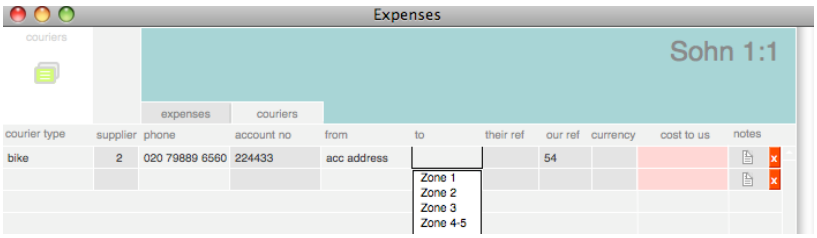
Be aware that courier costs added via this method will not appear on your estimate, but they can be billed to the client.

To add courier costs to a job:
1. Click the expenses icon. You can be in ANY Traffic screen where you see this icon to do this.
2. Choose the correct job (from the list that appears) to add the cost against.
3. In the next window, click the “couriers” tab.



4. Starting from the left, choose the “courier type” from the drop down that appears in the first field. This will only contain courier types that you set up in Administrator, for example “bike”, “van”, etc.
5. After selecting a type, choose a courier company from the drop down in the next window.

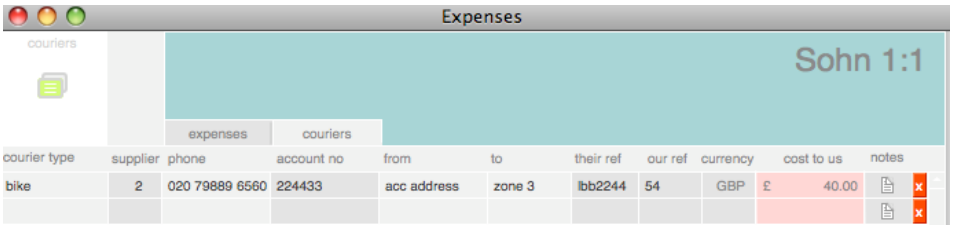
6. Move to the field marked “to” and choose the destination that the delivery is to go to. This will pull the details from the “postcode” area that you set up in administrator.
The “from” field always defaults to “ACC ADDRESS” but you can overwrite this if the item is not being picked up from your own address.



7. Selecting a destination will bring in the default cost for a delivery to that address, as stored in Administrator. If you have not stored a cost, you can now type your own figure here.

8. You now have two reference fields. “Their ref” can be used to type in the couriers company’s own reference number for the delivery. “Our ref” will contain a unique system generated number that you can give to the courier as your reference. If you prefer you could also give them the job number, as this is always displayed at the top right hand corner of this window.

9. There is a notes field if you wish to add details of the delivery. Notice that the mark up for billing is not visible at this time. It is created in the Administrator area, but it can also be checked or adjusted prior to billing (at Cost Capture stage).



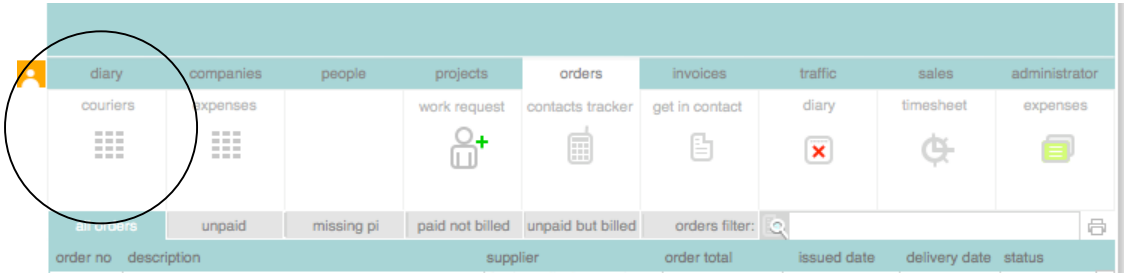
10. Click the left hand window icon to close the window once you have finished.

Couriers added in this way can be monitored as costs against the job, and billed on to your client in the same way as normal expenses. The difference in doing it this way is that you can also match up these costs to the couriers’ invoices, and enter these invoices into Traffic for your own records.

Adding a courier invoice to Traffic

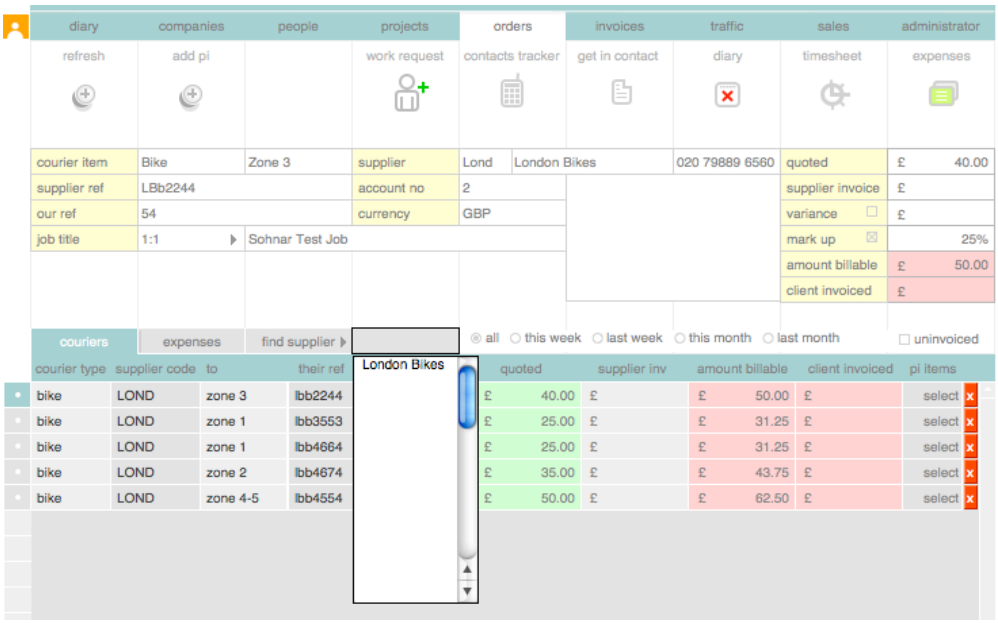
Courier invoices may often include several orders across different jobs for a certain time period. There is a special area in Traffic for matching courier orders to invoices.

When you receive a courier invoice, go to the “orders” tab in Traffic and click on the “COURIERS” icon, at the far left.



This takes you to the couriers area where you can search for all courier orders and select the ones that the invoice is billing you for.

Begin by selecting the correct supplier from the drop down window marked “find supplier”, just above the table of order items. You may only have one as in our example; otherwise the list will show all courier accounts.


diary companies people projects orders invoices traffic sales administrator
refresh add pi work request contacts tracker get in contact diary timesheet expenses
courier item Bike Zone 3 supplier Lond London Bikes 020 79889 6560 quoted £ 40.00
supplier ref LBb2244 account no 2 supplier invoice £
our ref 54 currency GBP variance £
job title 1:1 Sohnar Test Job mark up 25%
amount billable £ 50.00
client invoiced £
couriers expenses find supplier all this week last week this month last month uninvoiced
courier type supplier code to their ref quoted supplier inv amount billable client invoiced pi items
bike LOND zone 3 lbb2244 £ 40.00 £ £ 50.00 £ select
bike LOND zone 1 lbb3553 £ 25.00 £ £ 31.25 £ select
bike LOND zone 1 lbb4664 £ 25.00 £ £ 31.25 £ select
bike LOND zone 2 lbb4674 £ 35.00 £ £ 43.75 £ select
bike LOND zone 4-5 lbb4554 £ 50.00 £ £ 62.50 £ select
London Bikes

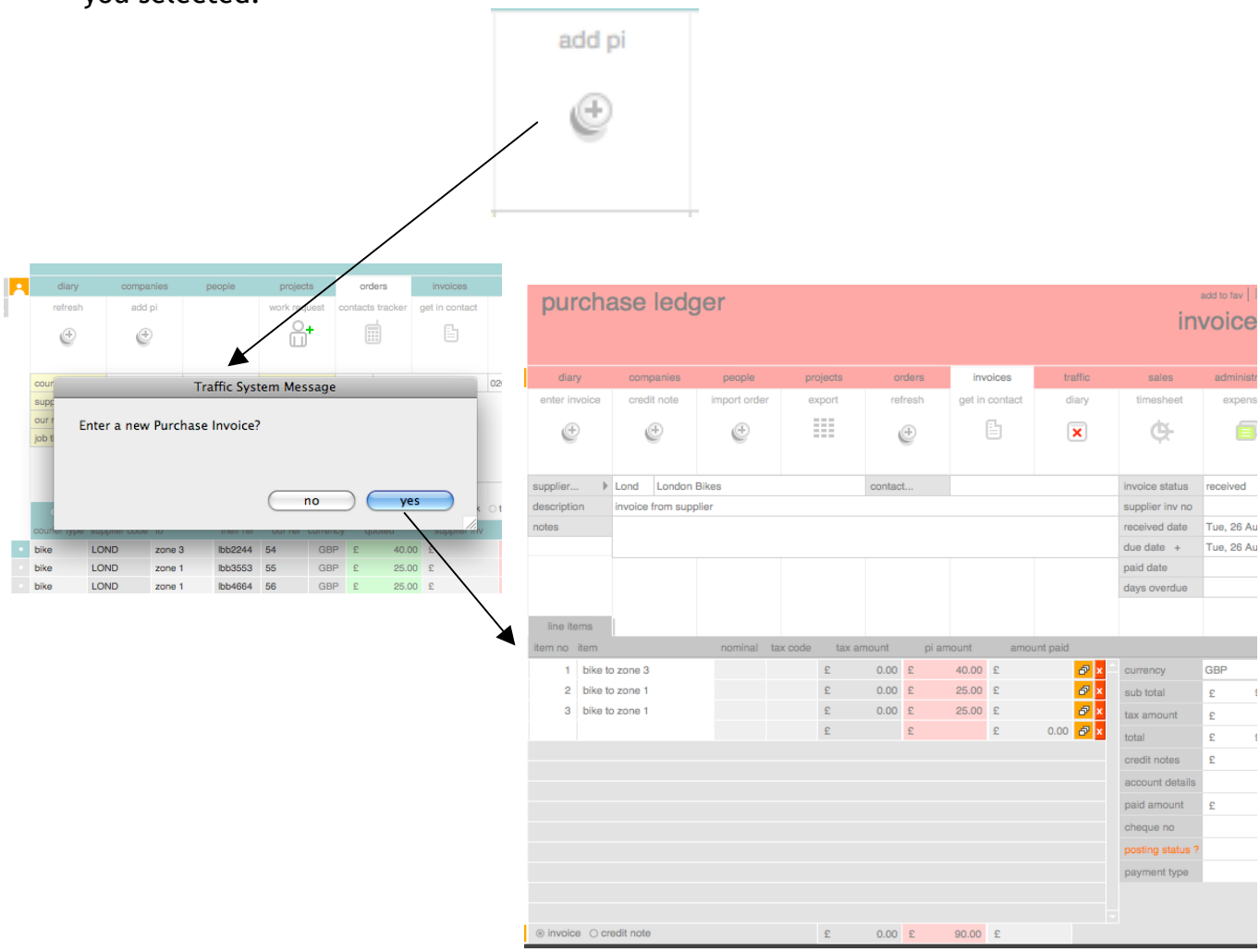
Now choose how many orders you wish to view from this company by selecting a time period of “all”, “this week” etc, by clicking one of the radio buttons to the right of this window.

You now need to select the line items the courier is billing you for. This is done by clicking the word “SELECT” at the far right of each line.

Click so that the field changes to “SELECTED” (displayed in red) for each line item on the invoice.

If you have previously used this screen top match orders, try checking the box marked “uninvoiced”, as this will remove from the list any lines that have previously been matched against an invoice.

Next click the “add pi” plus button at the top of the screen and a courier purchase invoice will be created in Traffic containing each order line that you selected.



You can now treat this in the same way as other supplier invoices, for example you can add the correct tax codes and credit terms, etc. The invoice will have the default status of “received”, which you can change to “paid” if you wish to add “amount paid” figures to the invoice.

Courier invoices created can be searched for under the “purchase ledger” area on the Traffic Invoices tab.

SALES AND NEW BUSINESS

The Sales area within Traffic allows you to create leads and new sales, track current sales and add estimates to existing leads and sales. You are able to add actions, notes and follow up reminders to any sale or lead you have created.

The sales targets allow you to set targets for individual staff members, review monthly sales targets for teams and individuals and review the monthly sales figures based on sales won and lost. There are also reports showing sales forecasts and best-case scenarios.

Sales set up in Administrator

Before you add new sales into Traffic you need to make sure you have some details set up in the Administrator area.

To find this area, go to the Administrator area, and click on the sales cycle tab on the lower right of the screen

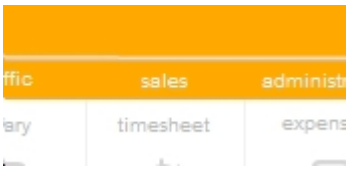
"Sales Cycle" – Here you can list your own stages of how a sale progresses from start to finish. There is a description field for the main way of identifying the stage, and a second field for adding further detail to the stage. You might want to use this to identify the actions you carry out that identify the stage of the sales cycle, for example, a stage called "sending our company brochures" might be something you identify as a very early on in the stages and a "client meeting" might be your definition of what you will do when the win probability is much higher

Just beside the Sales Cycle tab is the "Sales types" tab - Identify the areas of business that you work in, and record each one as a new line in this area. These names are used in the drop down of "opportunity types" when new sales are created. Examples might be "Design for Print", "Event Management", "Branding", and so on.

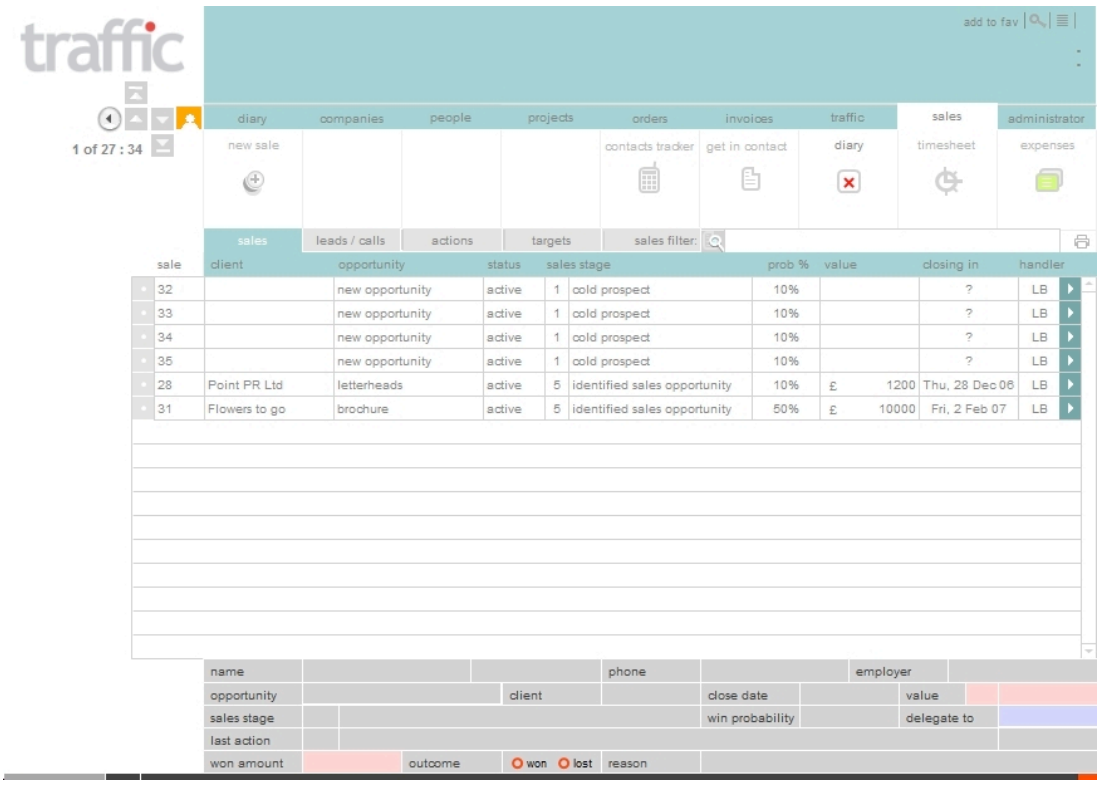
You are now ready to add new sales into Traffic.

Sales Area

To select the sales area, click the sales tab along the main Traffic toolbar.

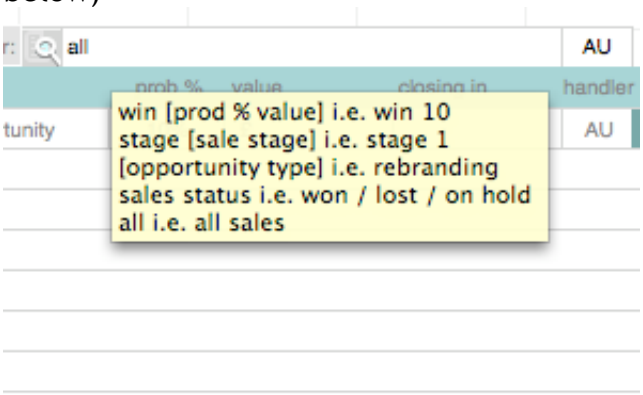


The sales area will be displayed with all the current sales opportunities listed:



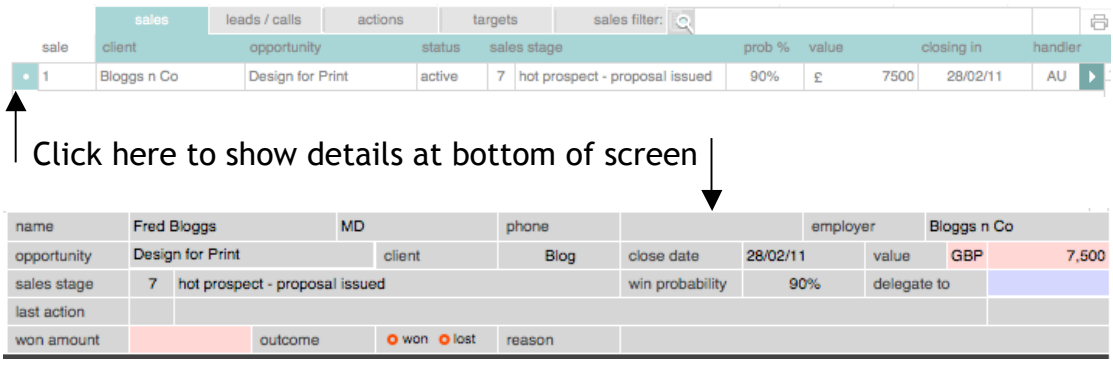
You can use the search field to look for sales using various filters. If the box is empty, the default search displays all “active” sales. For each of the searches, you also need to choose the staff member’s initials in the box to the right to see that person’s sales.

A roll-over menu shows the ways you can search using the quickfind (shown below)

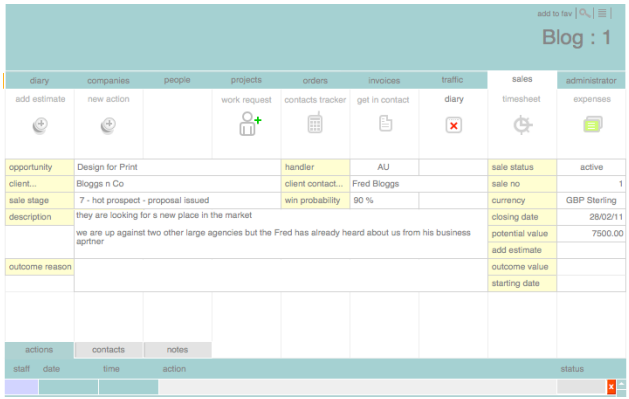


To select a particular sales opportunity:

Click on the button to the left of the screen to select the required sale. Details for this sale will appear at the bottom of the screen.



To see further details and amend a sale, click the arrow to the right of the sale. A sample of the full screen view is shown below:



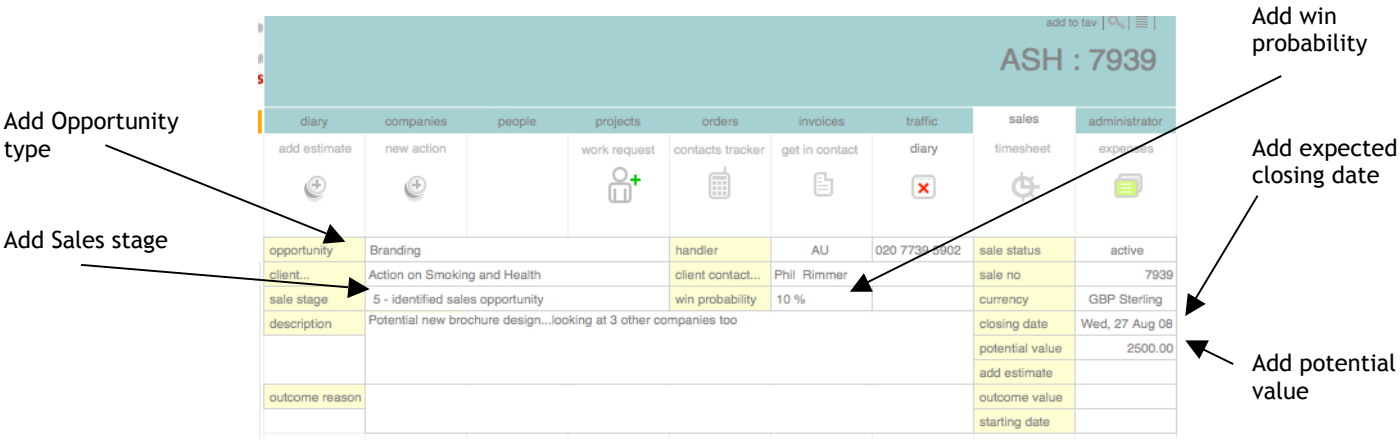
Next we will look at how a new sale (like this one) is created.

Add a new sale

To add a new sales opportunity to the system:

Click the new sale plus button.

Select the company and contact name the sale is for. You cannot create a sale if there is no company record in Traffic for the opportunity to be linked to, so any potential client companies must be added in the Companies area first. Remember you need to add a person working at the business as well as just the company name itself. You can now add the details of the sale.



The sale status (top right of table) should be left as active until you either win it or lose it, or wish to mark it as "on hold". The sale is given a generic, sequential number, which will show at the top of the screen (in our example it is 7939). There is a description box to hold more information, and a notes field in the tabs below for more space.

The other two lower tabs are:
"Actions" – this holds reminders of actions you wish to leave for yourself in the sales area. These are NOT the same as follow up actions or actions made in Get in Contact records. Sales Actions only appear in this screen. You can change their status between "to do" or "done".

"Contacts" – shows all contact records attached to this sale. You may prefer to use this as it has it's own "follow up actions" function, which link to your "to-do" list in the Traffic Diary.

Using the "Get In Contact" function as a Sales tool

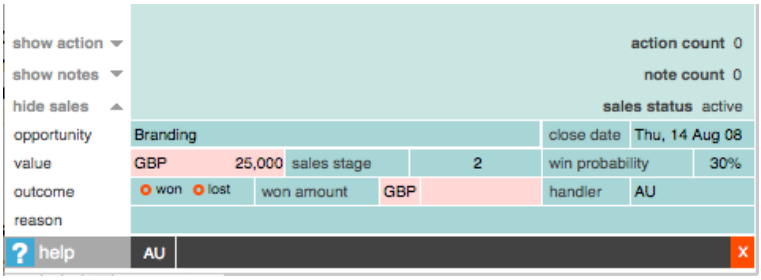
Please refer to the earlier section in this manual on "Get in Contact" for a full introduction to this feature. Here we will just look at how it works in connection with Sales Opportunities.

When you use Get in Contact to keep records of dealings with various companies you can use the options of "mark as a lead", "add a sale" or "attach a sale" to start following the progress of a potential client.

1. Mark as a lead.
Contact records marked as a lead are no different from normal contacts, except that their subject lines will appear as **BLUE**, and your follow up actions (in the diary area) will appear in blue as well. Apart from this colour, a contact record marked as a lead is no different to a normal one.

2. Mark as a New Sale
Doing this to a Get in Contact record changes the areas that would be coloured blue for a lead to **PINK**. As well as this, a brand new Sales Opportunity is automatically created, which can now be tracked in the sales area of Traffic as described above. At this point, the new Sale will be blank, but you can fill out all the main details directly from the Contact screen itself:

Completing the Sale information for a new Sale
You will be prompted to fill these in if you make the new sale from the Get in Contact window, and the details are the same as listed for creating a sale (described earlier)



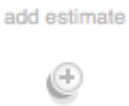
3. Attach a Sale
You may also link the get in Contact record to an existing sales opportunity. Clicking this box will bring up a search window for you to select a sale to link this record to. The contact record then becomes **PINK** in your records in the same way as before.

Monitoring a new sale

As the sales progresses you are free to change the details whenever you wish. Some things you may change are:

Change the win probability:
You should update both the Sale Stage and the Win Probability as your sale gets more likely. Both fields are changed manually and have no auto-change rules. The two fields are not linked.

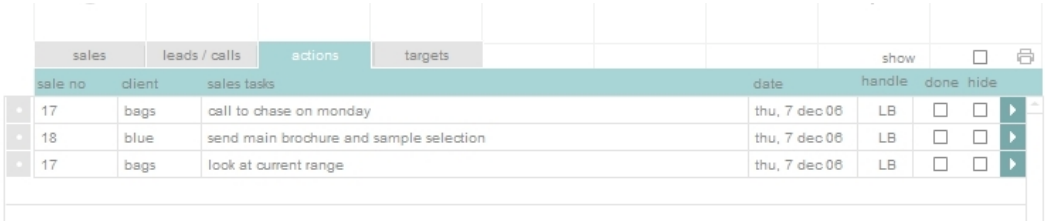
Add an estimate:



As the sale gets more likely you may have created a full estimate in the Projects area of Traffic. If this is the case you can click the "add estimate" plus button (once the estimate is made) and this let you search for, select and then link the value of the estimate to the sale.

NOTE THAT THIS WILL REPLACE ANY EXISTING POTENTIAL VALUE FIGURE.
The sale is now expected to be the value of the estimate if you win it. If you click again on "add estimate" you will be able to remove the estimate or be taken to the estimate. Once added, the figure will change if you modify the estimate (you won't be able to manually change it from this area).

Add an action:



This will open a new "action" line at the bottom of the record. It will add your name, the date and time of the action, and you just need to fill in the details (you can also add these action lines manually). You can also do this with Get in Contact records- the ones in here do not appear in your diary.

Add more contacts records
Use the "get in contact" icon while in an individual sales screen to make a new contact record that is automatically linked to this sale.

Mark as won or lost:
If you mark a sale as "won", the potential value figure will move into the "outcome value" window. This window can be manually changed on the summary screen. If you mark the sale as lost, no figure will appear here.

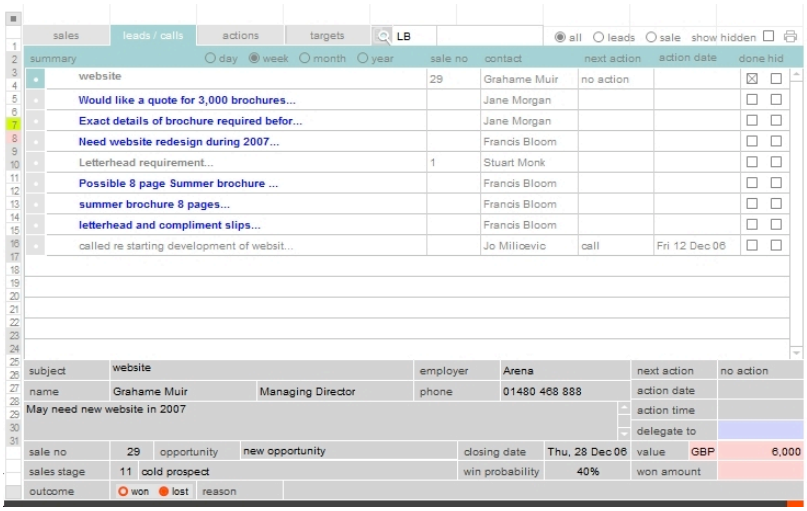
Sales reports and overview in the Sales tab

On the main screen of the sales tabs there are some places to see a broader view of sales activities.

To print or preview a report of current sales, click on the printer icon.You will be prompted to choose either to print or preview the report on screen.

Leads and Calls Summary

The leads/calls area provides a summary of the leads and calls added previously in the get in contact area. To access the leads/calls area, select the tab as shown below:



Leads are shown in blue, sales are red and all others are black. Options here are as follows:

1. Use the initials button at the top left to see information for different people.
2. Use the date selectors at top of the table to see contact records in a range (choose from “day”, “week”, “month” or “year”. “Day” means the current Traffic diary date. IMPORTANT NOTE –The contact will show results for contact records created in that time period, but if you have added a follow up action, the contact record search will be based on the date of the action.
3. Use the radio buttons at the top right corner to view all records, or just “leads” or just “sales”.
4. Click the print icon to print a report on the selected records.
5. Click the grey “select” button against any line item to see full details of this entry at the bottom of the main window.

View Sales Targets

targets and monthly forecasts						
	december	january	february	march	april	may
target	50000.00	90000.00	50000.00	50000.00	50000.00	90000.00
active sales	1					
won	5000.00					
lost	105000.00					
best case	2200.00					
win probability	5120.00					

The targets area shows the following:

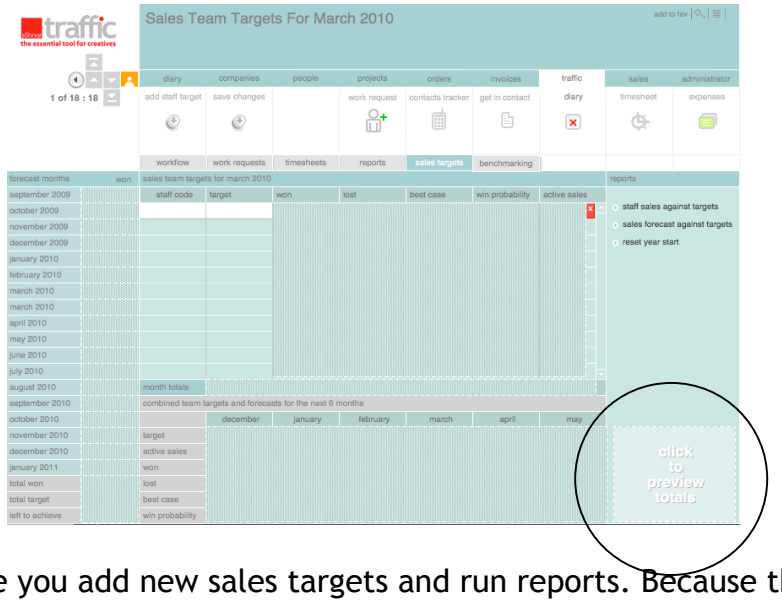
- Target - target set for each month.
- Active sales - the total number of active sales assigned to the user.
- Won - the number of sales won during the month.
- Lost - the number of sales lost during the month.
- Best case - the maximum value of sales for the month.
- Win probability - multiplies the likely percentage by the total amount of the sale.

The only targets that show here are those set up for the current user (ie he person logged into Traffic). To see an overview of all targets for all staff, you need access to the Sales targets area of the reports section of Traffic. This is also where the targets are set up.

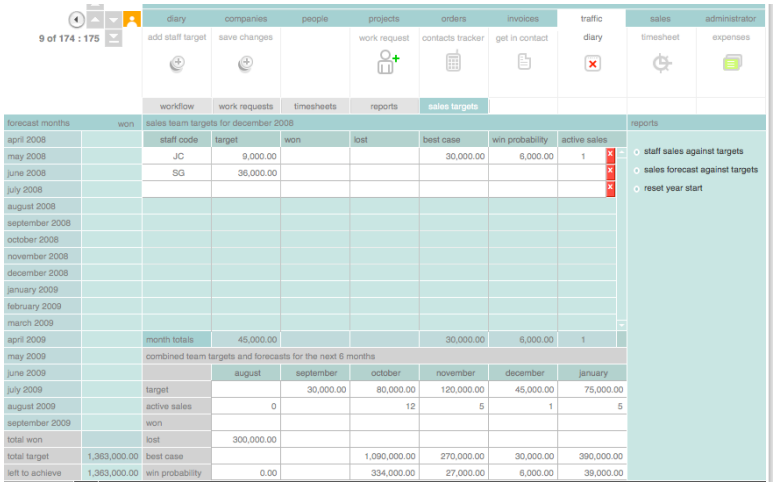
Create Sales Targets

To add targets you need access to the Traffic tab. Here, sales targets can be set and monitored for all Traffic users.

Select the Traffic tab, then click the sales targets tab. This area has two views: a data entry view and a figures preview. When you first click the tab, you will see the data entry screen displayed:



This is where you add new sales targets and run reports. Because the targets area contains a lot of data you will need to click the button marked “click to preview totals” to see the final data. The full view looks like this (please allow some loading time).

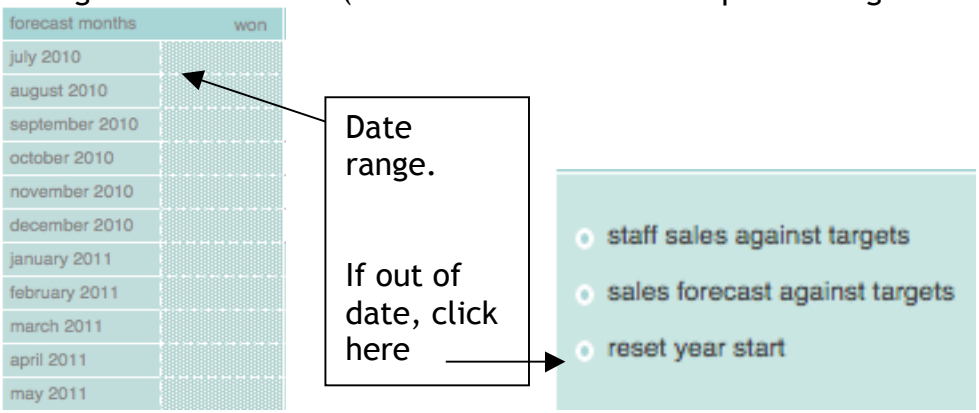


To return to the data entry view after seeing the figures, click the enter button on your keyboard.

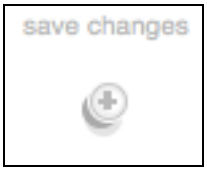
Entering Sales information

If there are no targets set, you may now enter them. The first thing to do is check or reset the date range of the Sales target screen.

Set Forecast Date Range
This screen will automatically show targets for 18 months starting from the system financial year start date click the plus button called add staff target. If the first date on the far left is out of date, you should go the Administrator tab, set a new financial year date, and then come back to this screen and click “reset year start”, which is one of the radio buttons on the far right of the screen. (Do not click the “click to preview figures” button).



The list of dates will now update. Click the “save changes” plus button at the top of the screen to make sure the date range is saved.

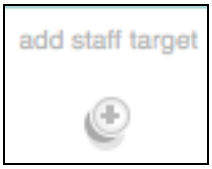


Note that the bottom of the column has fields for total won, total target and left to achieve figures.

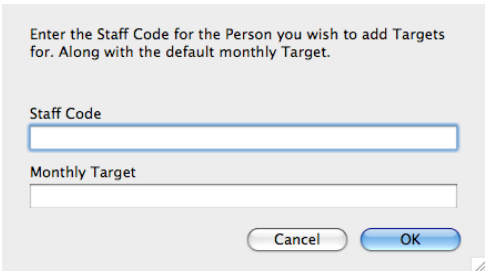
You can see figures in these areas when you go into the preview mode (explained in the next section). These figures are automatically generated.

You can now start setting targets for staff members

Setting targets
To add a new target, click the “add staff target” plus button at the top of the screen.



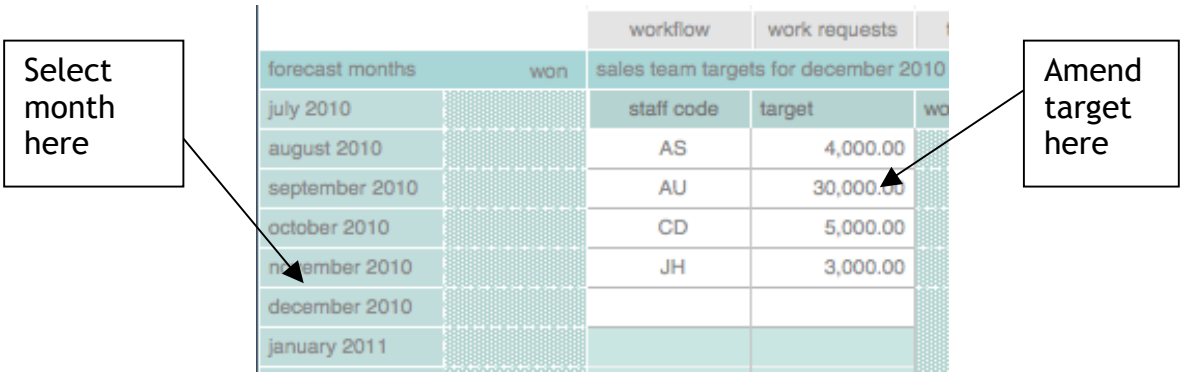
The following pop up will now appear:


Enter the Staff Code for the Person you wish to add Targets for. Along with the default monthly Target.
Staff Code
Monthly Target
Cancel
OK

You will be asked to enter the staff members initials, and a sales target. Input a target for one month and this target is input automatically for the whole year.

Repeat this process with as many staff members as you wish to add.

You may now edit individual months to vary the target for the year after creating the default setting. To see or amend different monthly, click on the appropriate month name in the list on the far left of the screen. For example, if you input a target of £10,000 and want to raise it just for December, click on “december” in the list on the left, and you will now be able to edit the figures for that month, for any staff members name in the centre of the screen.



Reports on Sales

On the Sales Targets screen you can choose to see two reports by clicking the radio buttons on the right of the screen:

Staff sales against targets
Sales forecast against targets

Both reports show all forecast sales figures for te forecast period. They can be printed or just previewed

There are more reports on Sales under the Traffic tab. Check the separate manual on “reports” for more details on these, but here is a summary of the four available reports

Sales opportunities

Provides a list of sales opportunities created in the Sales area of Traffic. Shows current status, close date, amount of sale with % probability and forecast amount.

Sales won

Lists all the sales won in the period selected, including amount and reason for win.

Sales lost

Lists all the sales lost in the period selected, including amount and reason for loss.

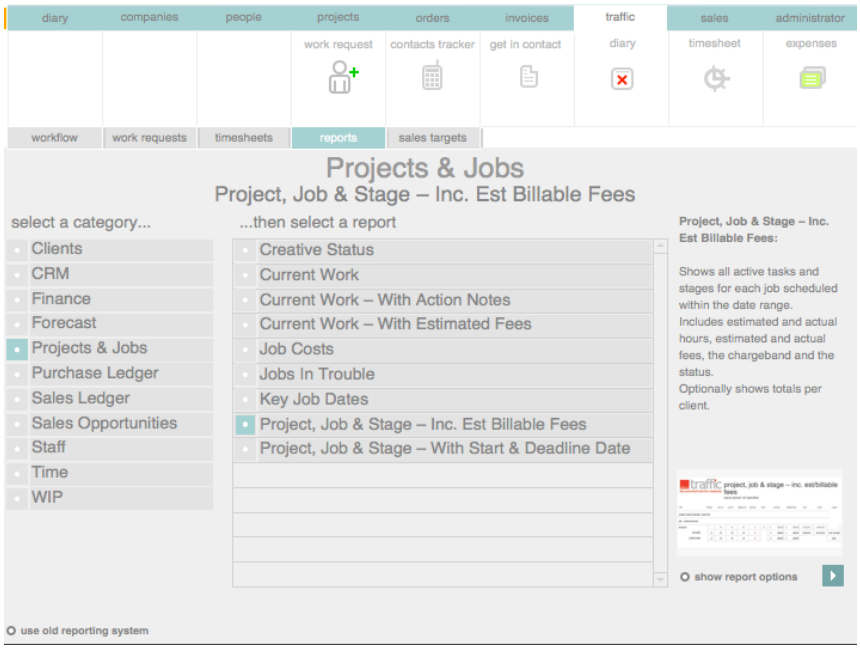
Sales consolidated

Lists all the sales with percentage probability and forecast amount.

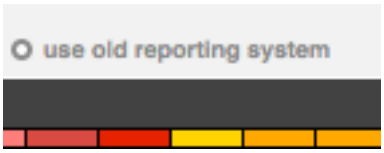
Reporting

We have produced a separate manual on the reports that are available in the Traffic system. Below is an introduction to how the section works, but it does not include a breakdown of every report. Please refer to the separate manual for this.

To access the main Traffic reporting area, go to ‘traffic’ and choose ‘reports’. You will see the opening screen of the new reports area as default if you have this newer version of Traffic:



NOTE: A different, original reports layout can still be accessed via the link marked “use old reporting system” at the bottom left of the screen. However we d not update these old reports anymore so using this is not recommended.



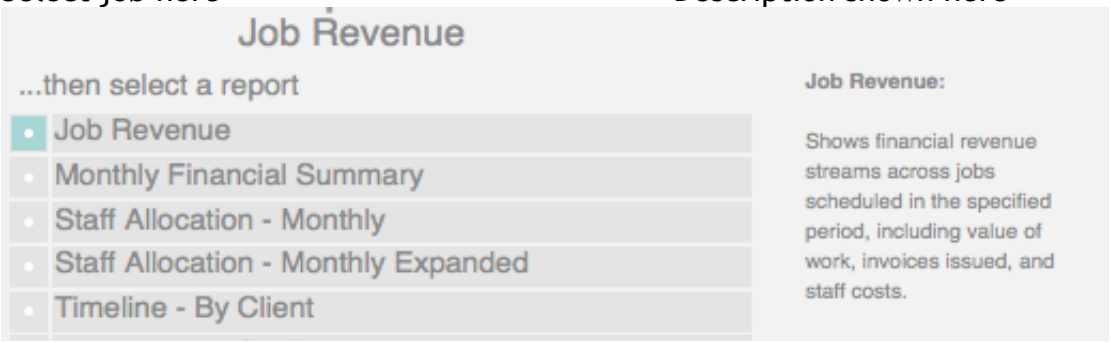
This will take you back to the original reports, but each time you access the reports area, the new format will be displayed.

Choosing a Report

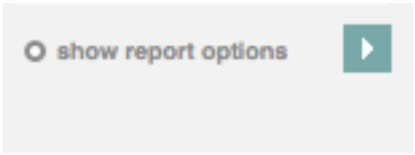
On the main screen you will see a list of the different report categories in a column on the left hand side, and all available reports for the selected category displayed in the centre of the screen.

First, use the select buttons to choose a category, then select the report you wish to view. Once a report is selected, a brief summary of that report will be displayed to the right of the list.

Select job here Description shown here


Job Revenue
...then select a report
Job Revenue
Monthly Financial Summary
Staff Allocation - Monthly
Staff Allocation - Monthly Expanded
Timeline - By Client
Job Revenue:
Shows financial revenue streams across jobs scheduled in the specified period, including value of work, invoices issued, and staff costs.

After selecting a report you have two choices. At the bottom right hand corner of the screen is an option called “show report options”. Clicking this will show all available filters that can be set before you run the report.

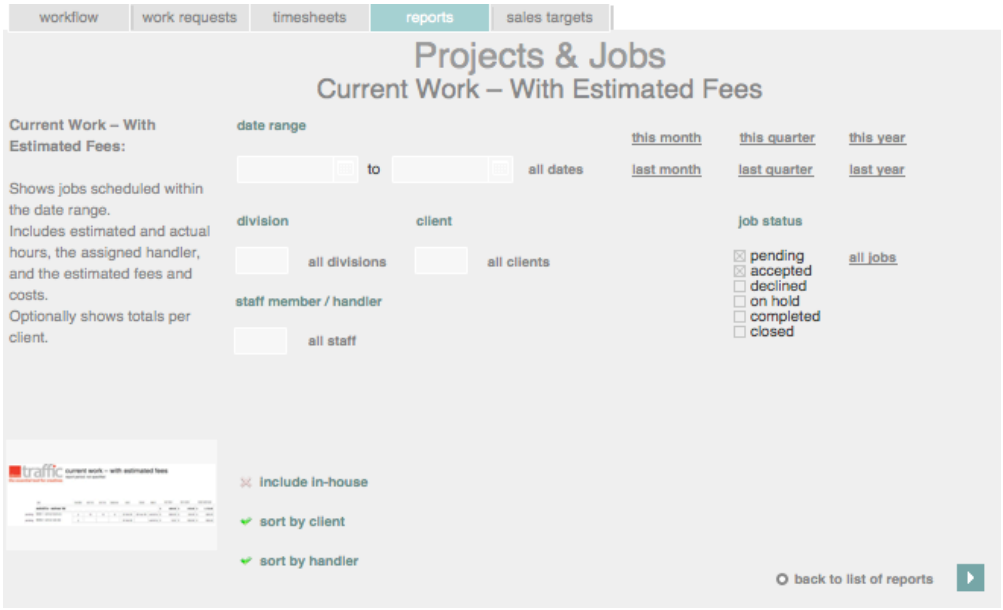


To the right is a green box with a white arrow. This button will open the report without any filters being set (some default filters will be in effect), but we encourage you to check the report options first.

Opening the Report Options

Each report will have a different set of available filter options, depending on the data the report uses. Some will have a date range, and other filters such as client, job status, division, handler, etc. You will see available filter options when you click the “show report options” button.

Here is an example of the filter options for a “Job Revenue” report.



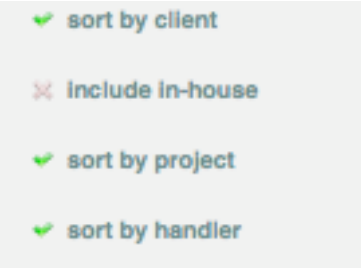
At the top is a date range filter, which you can manually set or use one of the pre-set options.

This report (as well as many others) can also be filtered by division. Choose from a drop down of your divisions or click “all divisions” to show a combined report).

It can also be sorted by client, or again to show all clients.

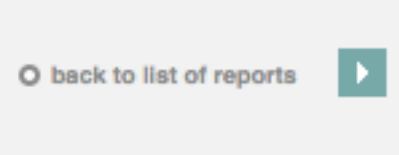
And by Job Status, check the boxes as required, or choose “all jobs”.

Towards the bottom of the screen are more options that you can “tick” or “un tick” as required. Note that many reports allow you to include or exclude projects marked as “in-house”.

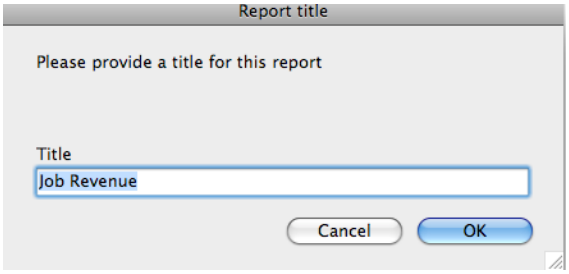


Bear in mind that these options will vary between different reports.

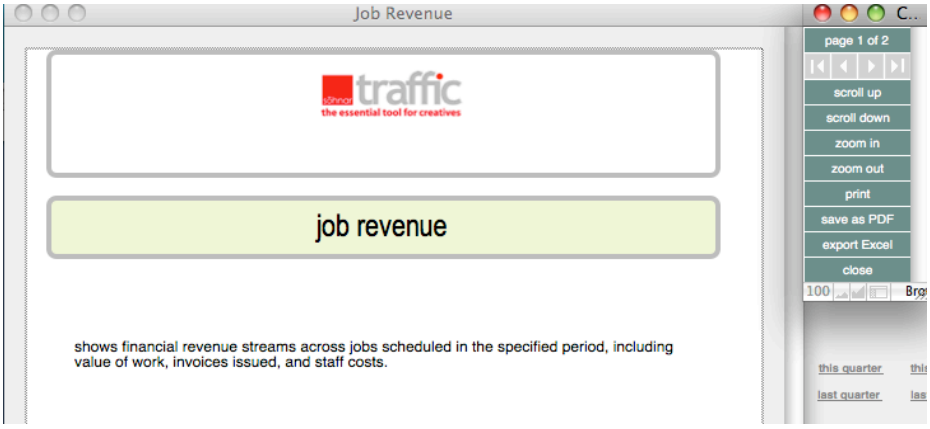
Once you are happy with your settings, use the green button at the bottom right of the screen to generate the report. Here, you will also see a button to go back to the main screen with the reports listed.



When you choose to run the report, you will have the opportunity of renaming the report before it previews or prints. The report will have the system default name, which you can keep if you wish.



You are now able to preview the report on screen. While in preview mode, there is a small window beside the report (on the right in the illustration below), with options for you to use:

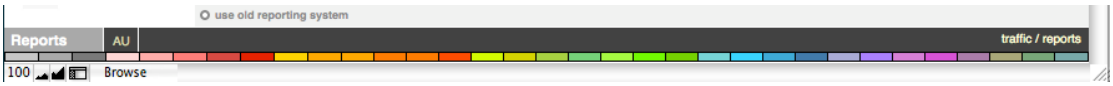


Options:

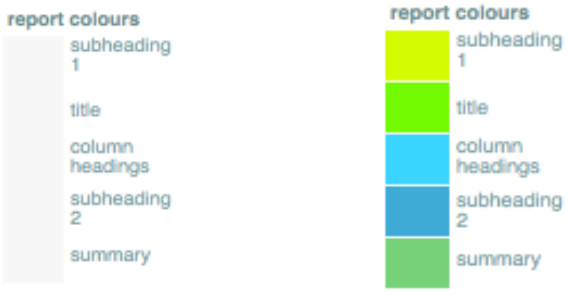
- **Page**: Use the left and right arrow buttons to scroll through the report pages.
- **Scroll Up/Down**: Moves the vertical scroll bar of the report up or down.
- **Zoom In/Out:** Make the preview screen larger or smaller.
- **Print**: Print whole report.
- **Save as PDF**: Save the report as a PDF in Traffic, to a location of your choice (choose to also save to your own location while the PDF is on screen).
- **Export to Excel**: Create an Excel spreadsheet of the report, which will be saved in Traffic (choose to also save it to your own location while the Excel document is on the screen. Some reports cannot be exported to Excel.
- **Close**: Closes the report preview.

Colours

You can also choose the colours of some of the reports. A small colour chart appears at the bottom left corner of the screen, showing which parts of the reports can be coloured. You can set your own colours for the reports by adding them to this table. The colours available are those in the colour strip at the bottom of the screen



To set new colours, simply click on the colour you want on this strip, hold your click button down, and drag and drop the colour into one of the spaces provided in the table. Once set, the colours will apply to ALL reports that have coloured areas, however, the colours can be changed at any time.



Before adding colours With colours set

We recommend that you ALWAYS set colours as some text may not show up correctly if all the report headers are white (no colour)

Reports Breakdown: The Traffic Reports manual

As already mentioned, because of the large number of reports, Sohnar have produced a separate manual which details them. Therefore, to see a detailed description on all the newest reports and how the information in them is compiled, please refer to the separate manual on Traffic Reports.

IN-HOUSE PROJECTS

The Traffic system allows you to mark whole projects as "in house" to make them non-billable. What follows are some suggestions of how this function might be used.

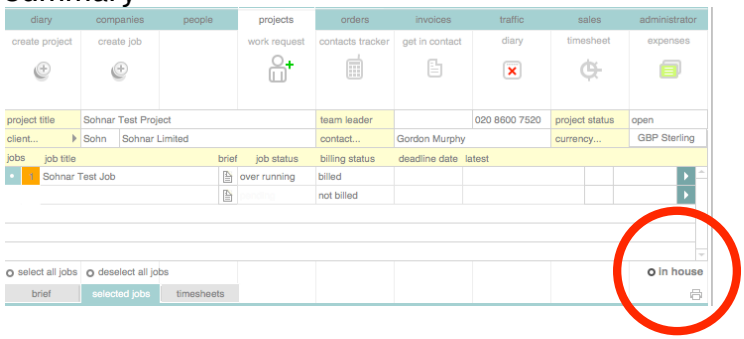
Holidays

Traffic can help you plan around staff holidays if you create a project and set up stages and tasks for your staff hours to be scheduled when they are on holiday. This means that when you check your Staff Schedule you can see which staff are unavailable.

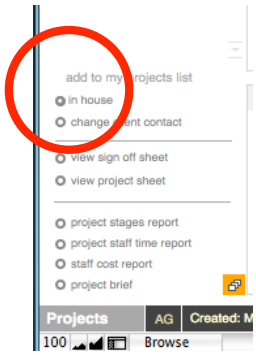
Preparing a Holidays project

- Make sure that your own business is set up in Companies. You might want to create an all staff "client team' in Administrator as well so that you can load all your staff members as the team for administration jobs like this
- Create a project for this company and call the project "Holidays", or "Time Off" etc.
- Be sure to mark the project as "IN HOUSE". This is done by clicking the "in-house" radio button that appears on the Project sheet and the main project summary screen (same button, but displayed in two places). This will ensure that work on the project is not included in current work and work in progress reports. The project is set as "in-house" when the button is black (the status can be changed at any time).

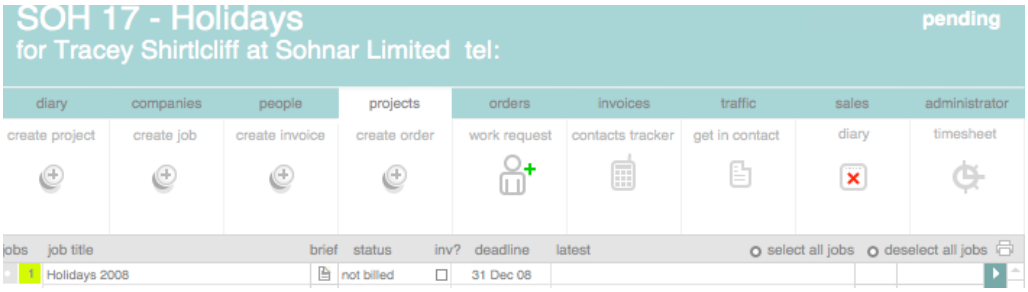
Project Sheet Summary



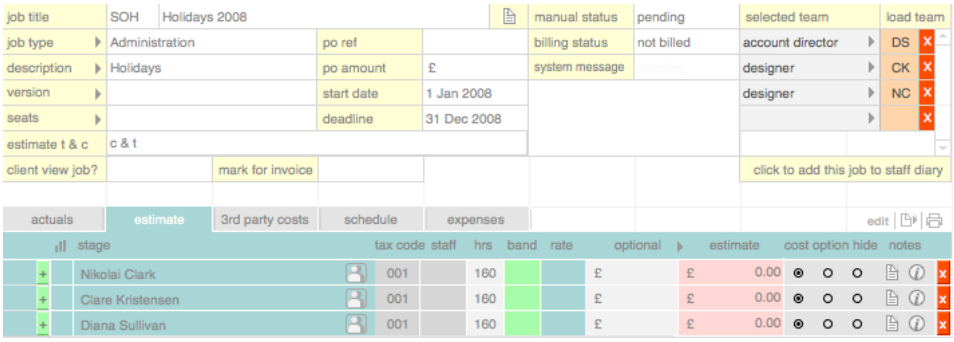
Project



- Now create a job for the whole studio or separate jobs for departments (i.e. Designers). As you are measuring time taken over a set period, it is likely that this job will run for a year so you could name the job something like “Staff Holidays 2008”, and give it a start and deadline date for that period.



- Once you have named it, go into the job and create stages, making one stage for each staff member (If you plan to repeat this process every year, it might be worth setting up a Job Profile). To help measure the amount of time being taken, you can enter the total holiday allowance in the field marked “hrs”, for example if your staff have 20 days holiday and an 8 hour working day, this figure would be 160.



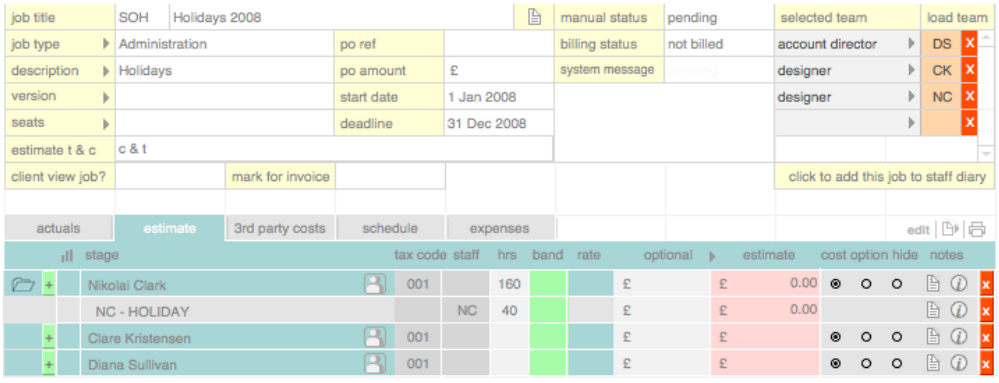
Entering Holiday Dates

To use the Holidays in house project, every time a member of staff books a holiday, add the approved dates as a task. You can name the task anything you like, for example the reason for the holiday or it’s date range might be clear enough.

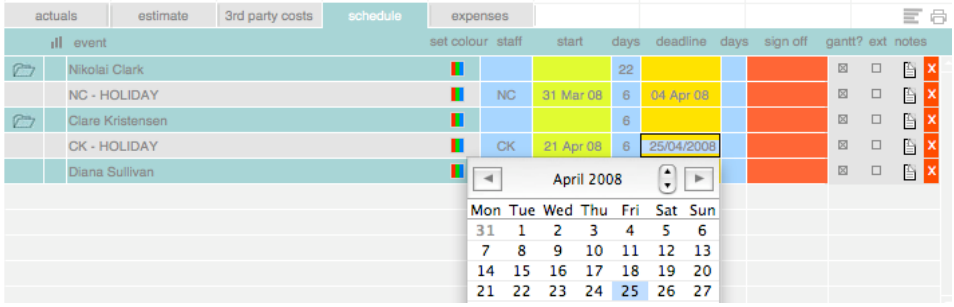
Next, enter a total amount of hours being taken off in the “hrs” field of this task, so in our example, five days off would be 40 hours. The stage should still hold the original figure (of 160), which is your reminder of the total allowance this person has.

Note: Alternately you could leave the stage field blank and each time you added a task for a member of staff’s holiday, you would see a running total of how much holiday they had used.

Now enter the staff member’s initials in the “staff” column for that task (Do not put the initials against the stage, because it is the duration of the task we are scheduling).



Then you will need to go to the schedule tab to enter the dates of that person’s time off. Do not use the “create schedule” plus button, instead, manually enter the start and end dates using the calendar drop down windows. This will schedule 8 hours of work hours for each day that person is on holiday. If the holiday goes over a weekend (i.e. a non-working day), you should start a new task for every period of consecutive working days, and leave the weekend days out.



Remember to click “add to staff diary”. This puts the holiday dates into that person’s Traffic diary, under the stages and tasks section.

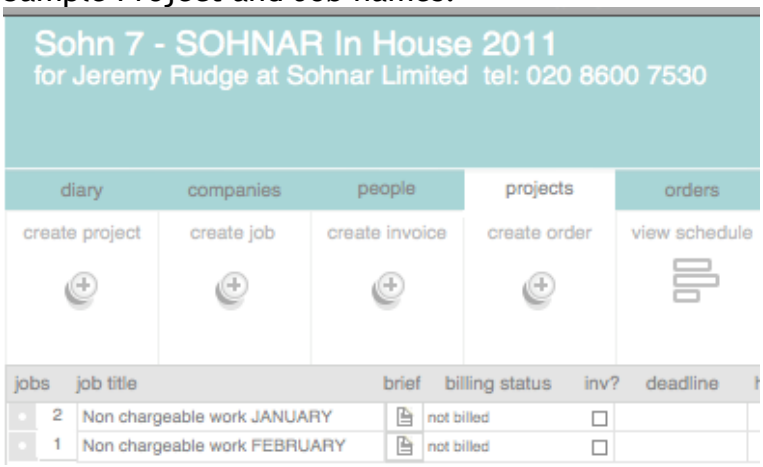
The scheduled holiday dates can now be seen on Smart Scheduling, Drag and Drop, and in Airtime. If you have calculated the correct amount of hours work for the period of time taken off, the chart will show that person as "fully booked" for the duration of the holiday booked.

The other advantage of a holidays project is that staff can fill out timesheets against the holiday "jobs" created and therefore still keep a full timesheet record.

Creating an ADMIN Job

Some Traffic users create something similar to a holidays job to record timesheets spent against non-chargeable time like meetings, staff training and admin work. The set up is just the same (create project, mark as "in-house", create jobs), so it is up to you how the jobs are titled and how many stages they have.

Sample Project and Job names:



Sample Stage titles

We recommend adding a nominal estimate of 1 hour per stage – as Airtime and Smart Scheduling require a figure here to function – but no staff names or dates need to be added in. Staff can access the job at any time from list views in Airtime, but they will probably not be scheduled against it.

TRAFFIC CLIENT MODULE

Client Module is an additional module and not part of the main system. PLEASE CONTACT SOHNAR SUPPORT IF YOU ARE INTERESTED IN HAVING THIS MODULE ADDED TO YOUR SYSTEM. It comes at an additional cost.

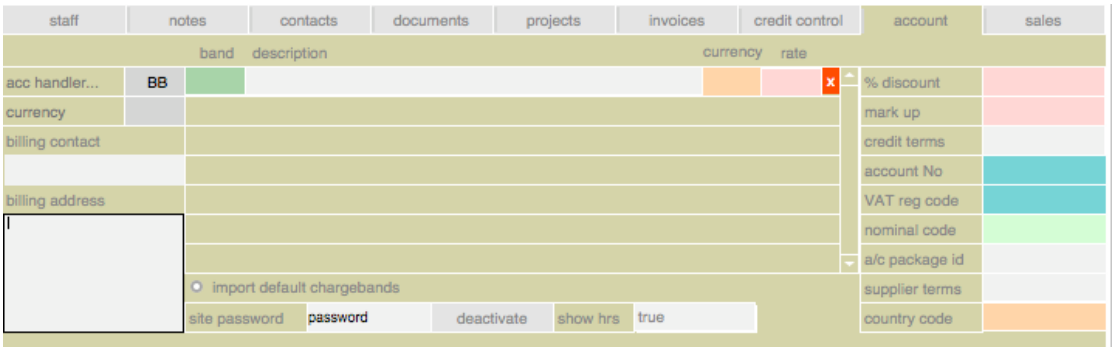
Traffic User Instructions

The Traffic Client Module allows your clients to log into Traffic and see the progress of their jobs and also send you requests.

This guide details how to manage what clients can see.

Enabling a client

To enable a client, select them in Companies and click on the Account tab.



Before activating a client they must have either an account handler allocated (top left of Account tab – above). This is to ensure that any inbound client requests can be correctly routed.

Next, choose a password and then click “activate”.

The client’s user name will be their Client Code, which appears to the right of their company name.

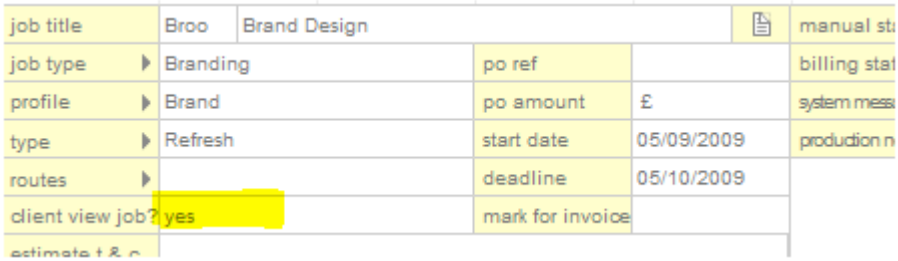
In the above example this would be “Prin”. Note that if you change the Client Code in the future, a pop up message will warn you if the client has a Client Module account.

Finally, decide if this client can or cannot see estimated and actual hours for the job. Click to the right of “show Hrs” and select true – they can see time – or false – they cannot.

Enabling a job

A job is enabled for viewing in two stages.

Firstly to enable the job, go to the job estimate screen and click to the right of “client view job”.



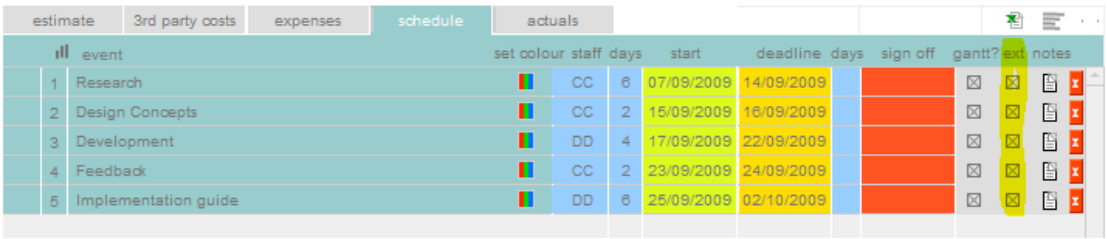
This will make the job visible to the client.

At this point they will be able to see job detail, history etc. but no stages and tasks.

Enabling View of Stages and Tasks

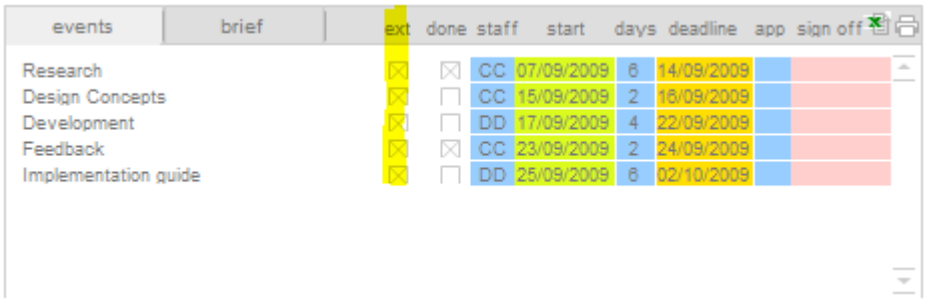
Client viewing of Stages and Tasks can be enabled in two places.

In the Schedule area:



Clicking the check box “Ext” will make the entry externally visible to the client.

Alternatively, in the project view:

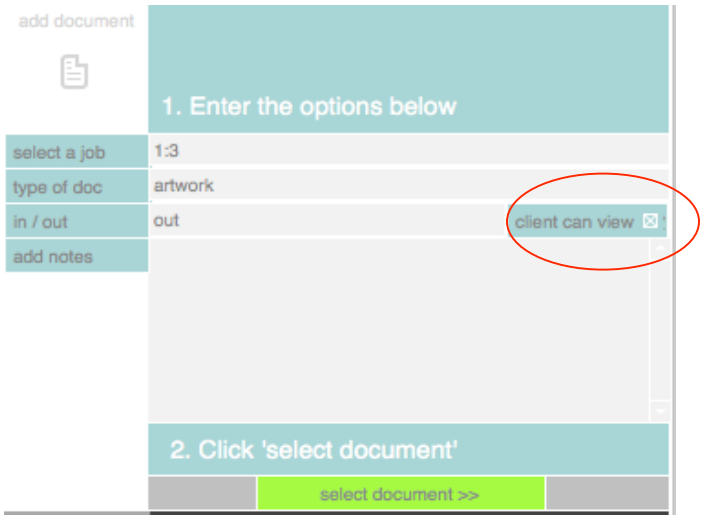


Here, you can check a similar box.

Each item to be client viewable must be selected individually.

Enabling Viewing of Documents

By default documents are not viewable to the client, but when you are adding a document, you may choose to make it client viewable by clicking the checkbox labelled “client can view”. Make sure you do this before clicking the “select document” button.



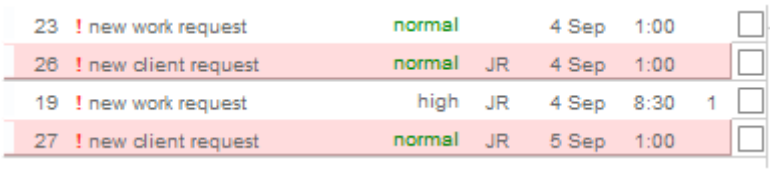
Receiving requests from Clients

Clients can make requests from the Client Module. These arrive in Traffic as Work Requests.

Requests are routed to:

1. The default account manager for that client.
2. The Studio Manager if the Studio Manager option is set to on. The operation of Studio Manager is explained elsewhere in this manual.

All inbound requests from clients are coloured pink in Traffic when they arrive, so that they can be identified as client, rather than internal requests.


23 ! new work request normal 4 Sep 1:00
26 ! new client request normal JR 4 Sep 1:00
19 ! new work request high JR 4 Sep 8:30 1
27 ! new client request normal JR 5 Sep 1:00

When the request is opened the background will also be pink. This is to remind you that ALL COMMENTS YOU PUT ON THE REQUEST WILL BE VISIBLE TO THE CLIENT.

Technical

The Client Module will be set up for you by Sohnar.

The Traffic Server will be hosting the web pages that your clients see. This will require a port on your router to be opened.

The average client opening time for the web page should be some 10 -15 seconds. If it is significantly slower than this, it will be either that the client folder has a very large amount of data in it, or more likely that your office ADSL connection cannot serve data fast enough.

For more information please contact Sohnar Support

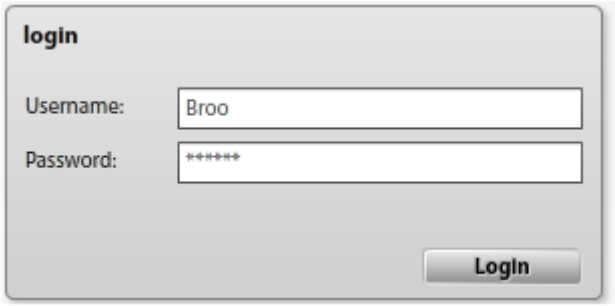
Using the Client Module as a Client

Logging On

To log in, your client will need to access the URL below:

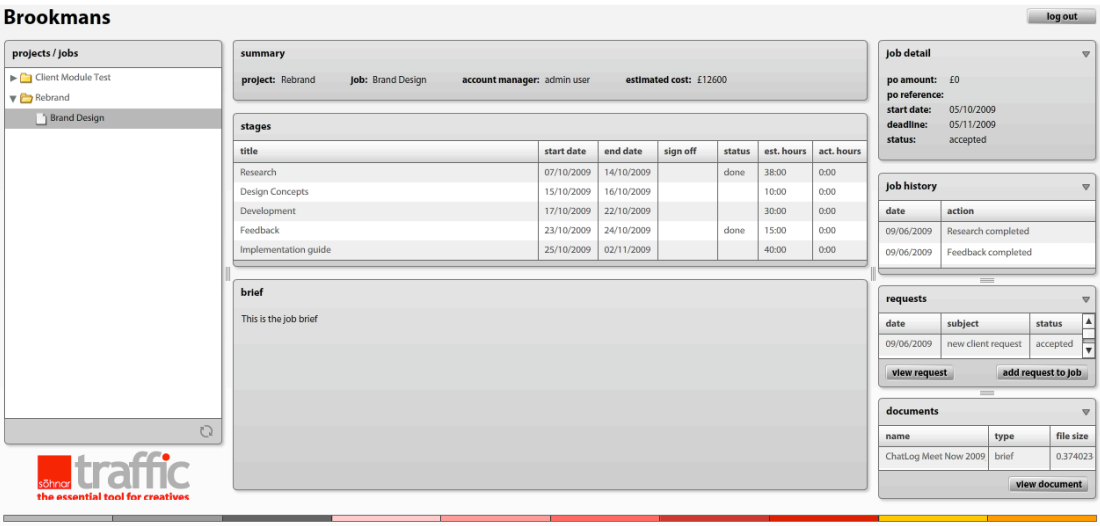
http://{IP address}/TrafficClientApplication/TrafficClientModule.html

Sohnar support will advise you of the correct IP address required in this URL



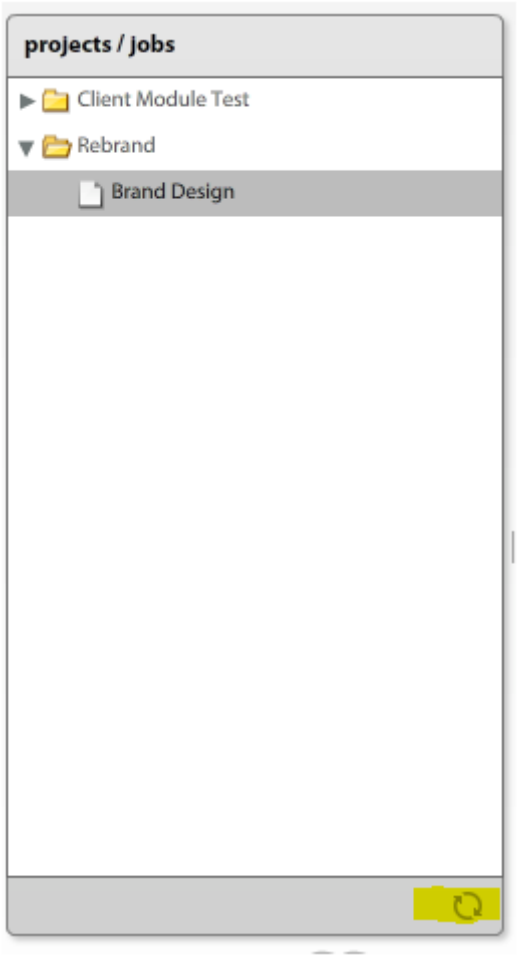
Advise your client of the username and password as set up in Traffic.

Client View



This is a sample of how a client home page might look after logging in. Each section of the above will be expanded upon in turn.

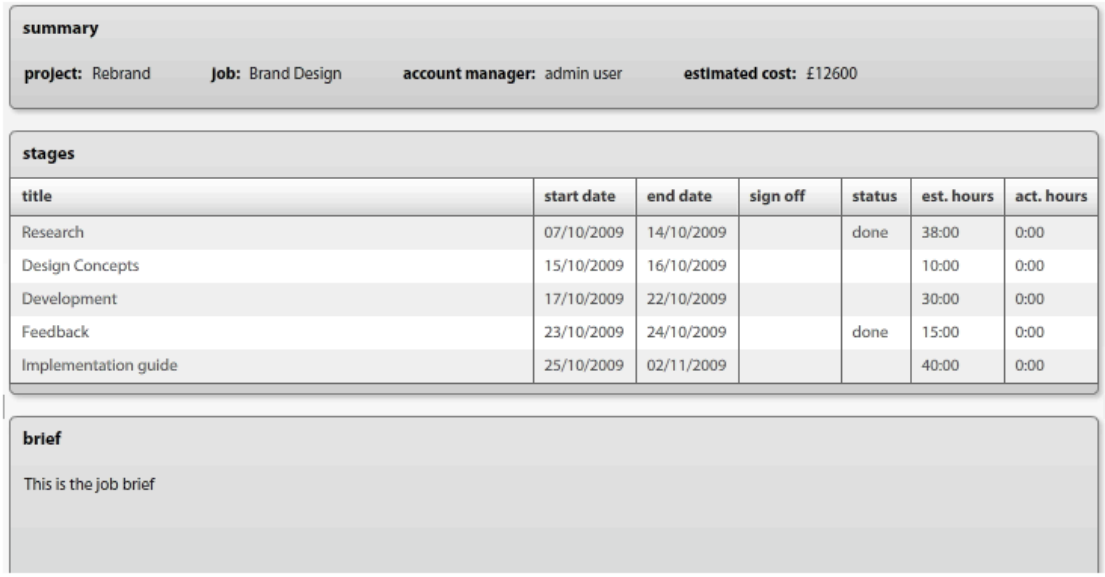
The Left Bar



The left bar is the principal method of navigation. The Client Module lets clients see Projects and the jobs within them. The project name is the top level tree – Rebrand - and Brand Design is the job.

The module loads all the data it needs when it first loads. Clients can refresh the data at any time by clicking the refresh button (highlighted).

The Centre Panel

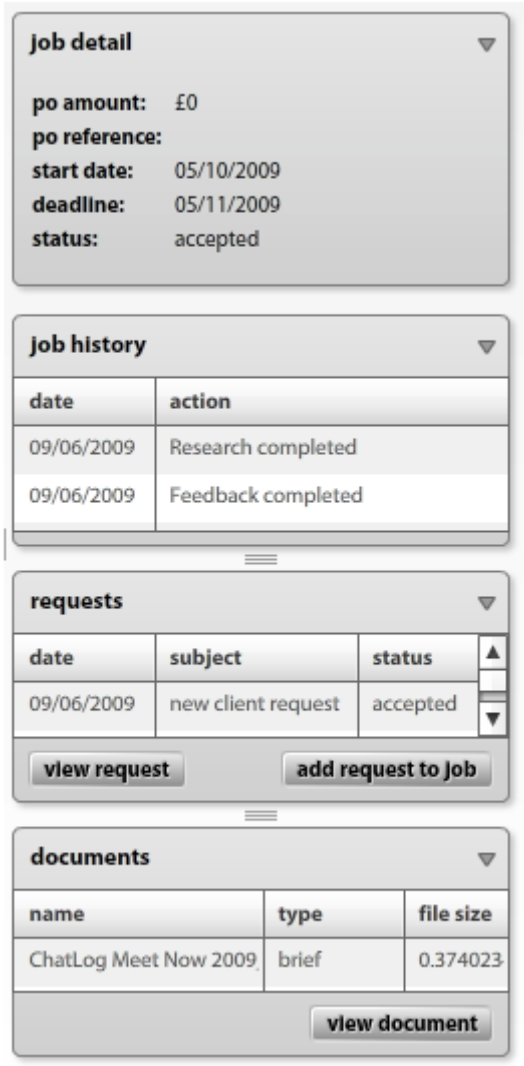


The centre panel shows a job summary, the stages of the job, and the brief.

For each stage, clients can see the proposed start date, end date, sign off date – often this is when client action is required by – and its status. Depending on the settings put in place in Traffic, clients may or may not be able to see the job hours.

Data can be sorted. Simply click the heading – title for example – and you will sort by that column. The columns can be resized if required and clients can also click on them and drag to change their order.

The Right Hand Panel



The right hand panel shows additional job information.

Job detail shows PO details (if used) start and end dates and also the job status.

Job History shows the date on which each stage of the job was completed (or re-opened). It will also display stage "action notes" if entered in Traffic.

Requests shows all requests. Clients can click on these to open them, or add a request. More on this below.

Documents will show documents that have been marked as “client can view”.

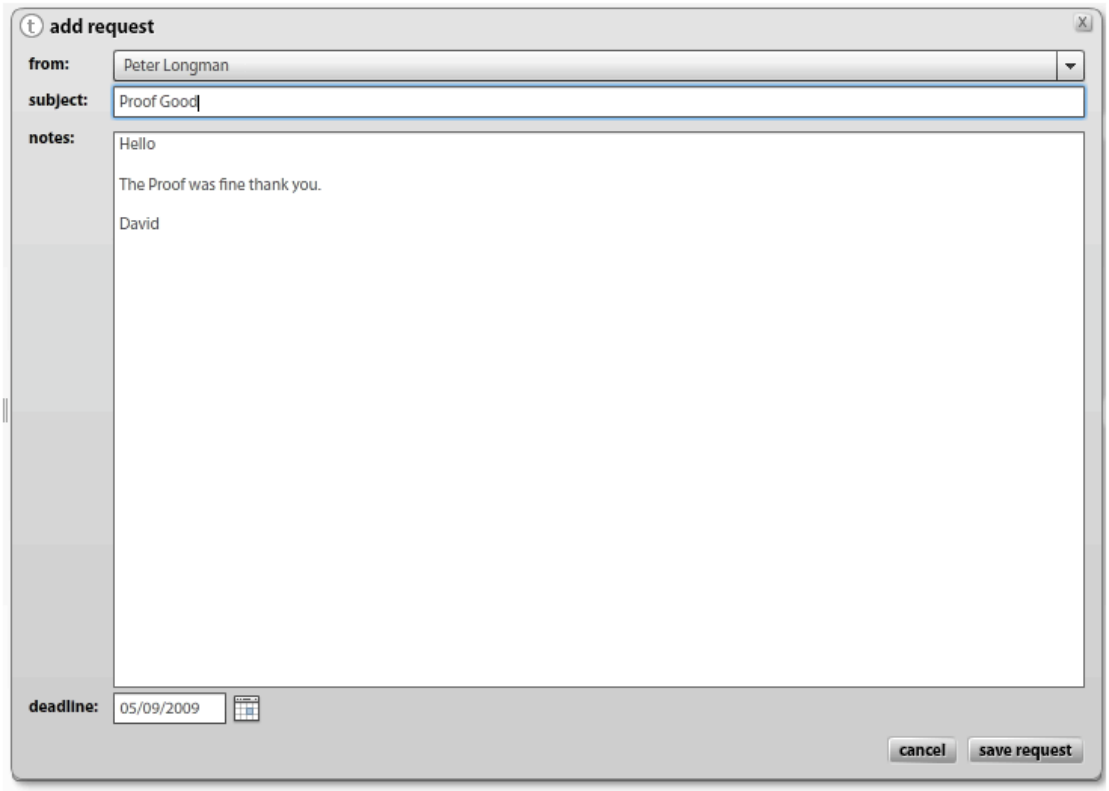
Each of these boxes can be re-sized using the symbol, or closed up using the in the top right of each box.

Sending a Request

The client can send a request to the Traffic user by clicking on the

button.

The context of this button changes depending on what you have selected (project / job / stage) but the user action is the same.

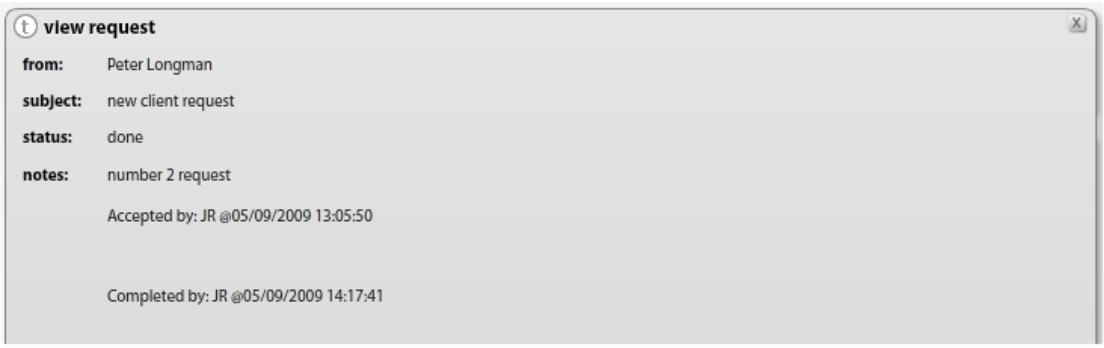


There is a drop down at the top which allows you the client to identify their own name. This is drawn from the Traffic Companies and People database.

The subject, notes and if applicable a deadline date should all be filled in, and the client then clicks “save request”.

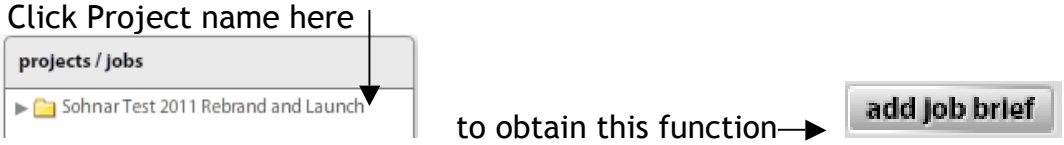
This will now appear in the main Traffic system for action. The status of the work request will change so that clients will know it has been dealt with. It will show accepted when accepted, and done when complete.

If the client views the request they will see all the agencies comments on the request, and also a date/ time / user stamp that shows when the request was dealt with. As such they can track its progress.



Sending a job brief: from client to Traffic user

If the client simply selects a project name from the list on the far left WITHOUT clicking n any job title inside it, the work request button will change to “add job brief”.



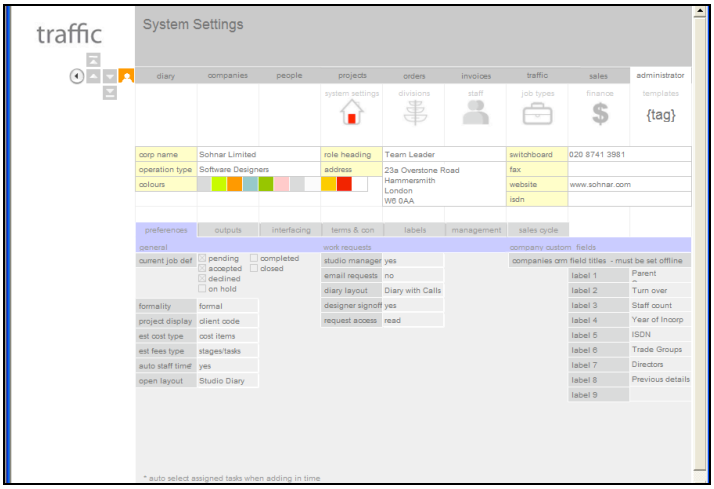
This means the client can write up a job brief and submit it (it is submitted in the same way as a work request). The account handler can then read the brief, call to discuss, or set up jobs as required, and use status settings like “accepted”, ”done”, etc. to let the client know what is happening. The client will then see the job appear under that project once the agency is ready to share it with them.

ADMINISTRATOR

The Administrator area in Traffic allows you to setup defaults for your Traffic system, change staff settings, create job profiles and set finance information. Most of these settings will never need changing and are set at the time of your Traffic installation.

Although many Administrator settings can be changed at any time once you have started using Traffic, there are many that should not need changing at all, and a couple that can only be changed by the Support team at Sohnar once set. These will be pointed out in this document.

To access the main settings - click the Administrator tab to access this area. The screen below will appear:



System Settings

The upper half of this screen (illustrated below) should be used to input your own company name and details. *(Set at install)*

(The fields for Operation Type, Team Leader and ISDN are optional and do not affect the way Traffic functions.)

corp name	Sohnar Limited	role heading	Team Leader	switchboard	020 8741 3981
operation type	Software Designers	address	23a Overstone Road	fax	
colours			Hammersmith London W6 0AA	website	www.sohnar.com
				isdn	

PREFERENCES

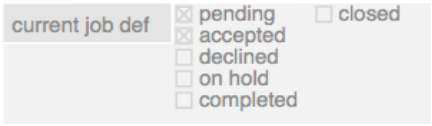
The first tab on the left on the lower half of the screen contains fields that set several preferences for your Traffic system. These should all be set up already for you.

Current job definition

"Current job def" allows you to define which jobs will appear in certain lists and searches throughout the Traffic system. The main impact of the setting is seen in timesheets, because hours can only be logged against "current" jobs. Some reports and searches also allow you to search for "current" jobs.

Therefore, you should have an X in the box against the type of jobs you would want to be able to look at frequently. We recommend that both 'Pending' and 'Accepted' jobs are set as current jobs, but some agencies also set 'On Hold' jobs as current if they wish suspended jobs to still be classed as active in the studio, and included in reports.

Note: This setting can only be changed by restarting your server, so please contact Sohnar support if you need to do this.

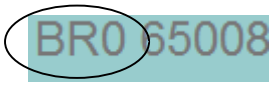


Formality

Select default setting of formal (Mr Longman) or informal (Peter) to choose how to address an individual when using certain letter and email templates. (Only certain templates in Traffic use this setting).
This setting is global but can be overridden in individual people records if needed.

Project Display

Choose Client Code or Division Prefix as the name displayed before the project number at the top of the screen when a project is selected. In the example below, the Client Code displayed is BRO. The recommended setting is Client Code.



Estimated Cost Type

This setting affects how you handle 3rd party costs in Traffic. The choice you make here depends on whether you tend to raise tender requests that have several line items, or whether they normally have one item only. We would suggest setting this to Cost Items as this offers the choice of using either, but to summarise the difference:

Choose *Cost Items* if you regularly split one estimated cost into multiple options for your client.
Choose *Cost Totals* if you usually offer one option of each cost type on your estimate.

Est Fees Type

Traffic creates estimates for Jobs using Stages. Stages are effectively the things that staff are working on within a job, typically things such as artwork, initial concept, project management etc. Sometimes you will require stages to be made up of smaller tasks because there are a variety of things that need to be done. An example could be Research, which could be made up of internet and phone. Some agencies do not need their clients to know if a stage of work is divided further within the studio. This setting affects how your estimates look.

Choose *Stages* if you need to print only Stages on the Estimate.
Choose *Stages/Tasks* if you would like the option to print both Stages and Tasks on the Estimate.

We suggest setting "stages/tasks" as you can still choose to hide the tasks on individual estimates.

Auto Staff Time

Set this to 'YES'. This setting only has an effect if you are assigning a Team to a stage. It ensures that when completing a timesheet, the correct rate for the individual is assigned automatically. The team function is not currently used, so setting it to 'YES' covers all your options.

Job Filter List

Affects lists of jobs that users see when adding timesheets. Choose whether the default jobs list your Traffic users see is all current jobs or just "my jobs" – jobs allocated to them, Affects full users only, does not influence Airtime.

Unalloc time
Enable or disables the adding of unallocated timesheet hours. Unallocated hours are those that have been submitted to the system but not against a specific stage. Even hours against a job are unallocated if no stage has been specified. Unallocated hours cause problems for you reports and figures, so we recommend this is set to "NO".

Drag n Drop Load
This has two boxes to hold numbers. What you are setting here is the amount of days that you wish to show by default on your drag and drop scheduling chart. Standard settings are 6 and 30. This means the chart opens showing 6 days prior to the current date and 30 days in to the future. Set these numbers to load a chart for an initial date range that suits you.

Tree Open
Only applies to drag and drop scheduling. Defines whether by default all folder menus on the schedule are open at initial screen loading, or closed.

Colour Pending
Only applies to drag and drop scheduling. Defines whether pending stages show in colour on the schedule or in grey. Accepted stages will always show in colour.

Work Request Settings

Work Requests are ways of sending direct instructions to design staff in Traffic. Some settings will be set in advance if you defined some simple aspects of how you work at your time of installation.

Note: Most Work Request settings can only be changed by Sohnar Support staff, once Traffic is installed.

Studio Manager - allows you to choose whether users can assign work requests directly to each other or whether work requests need to go via a Studio Manager.

If you have a Studio Manager (or equivalent) who will take responsibility for co-ordinating the distribution of work done in the studio, set this to YES, and select the initials of the person who will be responsible for this. If you have more than one person who needs this ability, then set Studio Manager to NO, as the function is only designed to set access for one name.

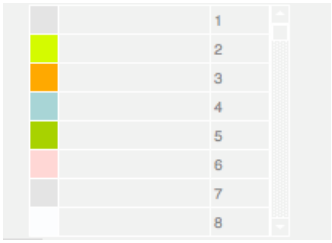
Email requests - sends emails to confirm work request status automatically. If set to YES, emails will come to the sender (or studio manager) every time a Work Request is accepted or declined. Set this to NO if you wish to use the optional email acknowledgement that is contained within Work Requests.

Diary layout - choose the default layout for the Diary area. This will show the diary in one of five slightly different ways. These can be easily changed once you know more about the Diary in Traffic. **This setting can be changed again by users after installation.**

Designer sign-off – this has two effects in the system. First it governs whether designers are allowed to sign off their own Work Requests once completed. If this is set to "no" Work requests can only be signed-off in the Traffic work requests area. Again this depends on if you have a Studio Manager who monitors this.
Secondly, it governs the ability to check the "done" box against stages and tasks in the diary area. If this is set to "no", stages and tasks can only be set as "done" in the Project summary screen.

Request access - choose if work requests can be amended (write) or not amended (read). "Read" would mean that the recipient could not overwrite the instructions from the sender of the Work Request. These instructions will eventually form the notes logged against the job, so we recommend this is set to 'write" in case the person doing the work needs to enter any more information.

Colour Bars



The colour bar fields can used to associate colours with types of work you do for clients when creating schedules. This is explained further in the "JOB PROFILES" section of this document.

Company custom fields

In the Companies area, under the “notes” tab, you can input more information about the company in 8 additional fields. You can choose the names that you give to those fields by setting them here.

must be set offline			
companies crm field titles		job date field titles	
label 1	parent company	label 1	copy due
label 2	turn over	label 2	brief
label 3	staff count	label 3	design due
label 4	year of incorp	label 4	meeting
label 5	ISDN	label 5	client review
label 6	set in admin	label 6	delivery
label 7	set in admin		
label 8	set in admin		
label 9	set in admin		

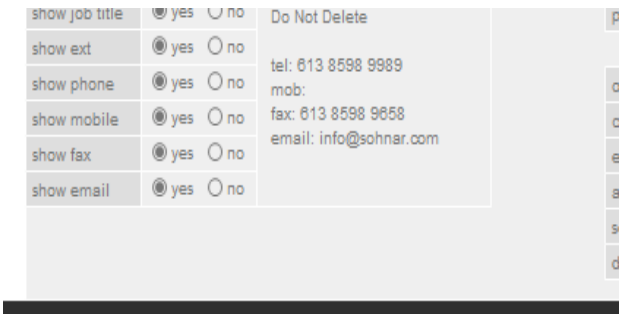
Job date field titles

Change the names of 6 date fields that showm in the job scheduling area. These field are for reference, not scheduling.

Note: Both of these settings have to be re-set by Sohnar Support Staff if you wish to make changes after your Traffic installation has taken place. If you are not sure what to call these fields, you can leave them blank for now, as they are optional fields.

OUTPUT

The Output area is the second tab from the left on the main Administrator screen. It handles the email setup for Traffic. **Currently Traffic only handles outgoing mail**.



Email Setup

Email works like the physical mail. You have a postbox for outgoing or SMTP mail. You have a postbox for incoming or POP mail. Commonly, SMTP and POP settings are the same. Traffic does not use Pop settings so you do not need too fill in these fields.

SMTP host
The name of the outgoing mail host, for example, mail@sohnar.com.

SMTP port
Input the port number for outgoing mail. The normal default setting is 25. Advanced users may choose a new port or channel.

SMTP auth type
Allows you to encrypt your email. Normally left blank.

SMTP account
This is normally a general account for incoming email for all your staff, e.g. sohnar@mail.com.

SMTP password
You might have a general password for all the mail, or staff specific passwords for both outgoing and incoming mail.

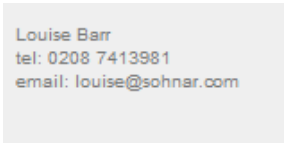
Character set
You can set specific alphabets that your mail uses, to enable the use of unusual currency symbols. Normally left blank.

Pop host/port/auth type/account/password
Not applicable

Email format
Normally set as TEXT as this creates the smallest email file sizes. You may select RICH or HTML as standard if your emails are going be formatted.

Email Signature

Select the details you would like to appear at the bottom of an email sent from Traffic. You can select whether to include name, job title, telephone number and extension, mobile number, fax number and email. The details selected will be displayed to the right of your selections. Details have to be added to each persons staff record to feature in this email address.



Att settings

This area is used to set the location for storing email attachments. Attachments are normally stored on local machines in Applications/Sohnar/Outputs (Mac) or C:\Program Files\Sohnar\Outputs (PC). This folder should be created during Traffic installation.

You can choose to store attachments in a different location on the local PC/Mac or on your server.

Email attachments are not the only way that Traffic stores documents. When you start using it, you will learn more about its Document Storage system, which automatically saves estimate, purchase orders, tenders and invoices in a PDF format. You can also upload documents to Traffic.

Output Settings

BCC Staff Member
Select YES if you would like all emails sent from Traffic to be automatically copied to the sender's email. The setting is BCC.

Email team
Select YES if you would like all emails to be automatically copied to the team. This will not happen unless a specific email template is used, so setting YES will have no effect to general Traffic use.

Address Format
Select the date format you would like Traffic to use throughout the system. The format of dd/mm/yyyy is recommended for UK based agencies.

Separator
Choose how you want to separate the date, month, year. Users typically select a full stop, dash or backslash.

Default font
Select the default font to use for printing documents from Traffic (used by Sohnar only).

INTERFACING

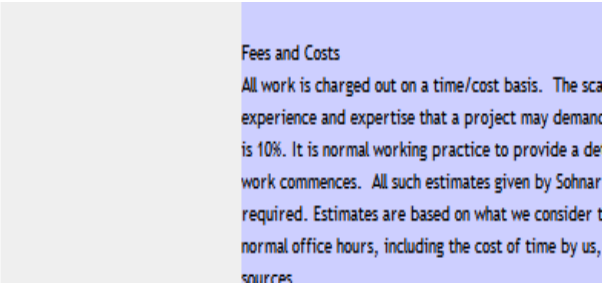
The interface area is used only by Sohnar staff, to add your logo to the top left of your Traffic screen, and to set up how Traffic handles various documents.

__Note__: These settings should not be changed by Traffic users. You should not make any changes here.

TERMS & CONDITIONS

Terms and conditions are the small print you issue with purchase orders, invoices, etc. to protect yourself from misunderstandings.

__Note__: Please note that these are company terms and conditions. If you have more than one division, you may need to enter different terms and conditions for each division.


Fees and Costs
All work is charged out on a time/cost basis. The sca
experience and expertise that a project may demanc
is 10%. It is normal working practice to provide a de
work commences. All such estimates given by Sohnar
required. Estimates are based on what we consider t
normal office hours, including the cost of time by us,
sources

There are areas to enter terms and conditions for general terms, estimate terms, purchase terms, client signoff, email, fax and credit control.

We provide some generic terms and conditions of the sort used by most design companies, but you may well wish to alter them. Even without alteration, they will automatically insert your company name in the places where the conditions say <<Personalisation>>.

To enter terms and conditions:
Select the appropriate terms and conditions tab e.g. purchase terms.
Type or cut and paste the information required into the appropriate area.

__Note__: It is important that you enter the terms and conditions texts in the fonts, sizes and colours in which you want them to appear. Please do not include any tabs.

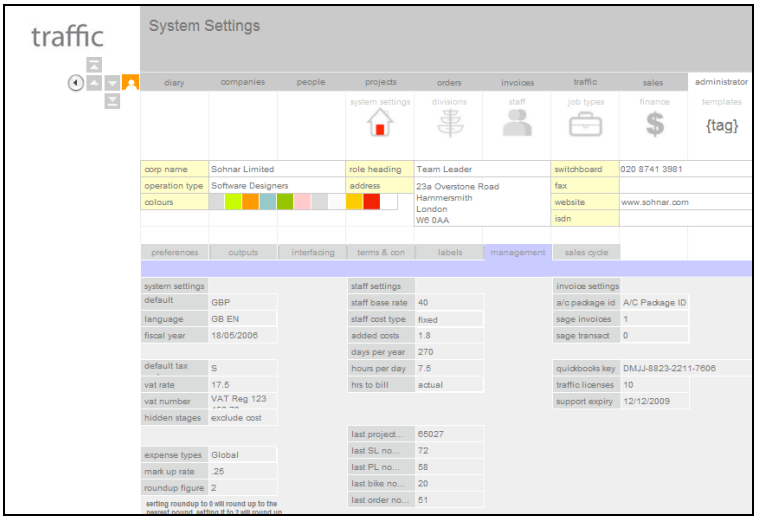
LABELS

This provides the list of labels, which can be selected when printing labels from the People area. Sohnar will provide a default set of labels for you, so there is no need to change any settings at this stage.

If additional label settings are required, this can be done at an additional cost, please contact Sohnar for more details.

MANAGEMENT

The management area is the 6th tab from the left on the main Administrator screen. It holds important settings which govern how Traffic measures many aspects of your business. These are normally set when Traffic is installed and typically will not need altering again.



SYSTEM SETTINGS

Default currency

Select default currency required for your Traffic system. Alternative currencies may be selected for individual companies or projects, but the one set here will be the default.

Language

Choose default language for your Traffic system. This affects a number of field names throughout the Traffic system such as whether your records display the names ‘zip code’ or ‘postcode’ and so on.

Fiscal year
This should be set to the first day of the current financial year. The setting affects financial reports and sales targets. You should change it once a year!

Default tax
Choose the default tax rate for your Traffic system.

VAT rate
Choose the standard VAT rate for the system e.g. UK is 17.5.

VAT number
Input your own company's VAT registration number. This may then be used in documents in the system such as the invoice.

Hidden Stages

Traffic allows you to "hide" stages from your estimate, which is commonly used when you do work that is not client facing or to temporarily remove a stage from the estmate. This option affects the printed estimate document, and in turn, the invoice. Select 'Include costs' if you would like any costs marked as hidden included in the final total on the estimate. Choose 'Exclude costs' option if you do not want the hidden costs to appear in the total estimate figure.

The recommended setting is 'Exclude cost', so that you can remove a stage from the estimate but still keep it in the system for your own reference. Including the cost of hidden stages would lead to an estimate with a total that does not match the stages that appear on it!

Expense Types

Expense types are standard prices for studio supplies, travels expenses etc. A local expense type is one that only applies to the division in which it was created. The recommended setting is 'Global'. Global expenses apply to all divisions. In companies with a single division, of course, there is no distinction.

Mark Up Rate

Input your standard mark-up rate for costs and expenses. The mark-up rate may be changed at any time for individual jobs and cost items, but this will be the default.

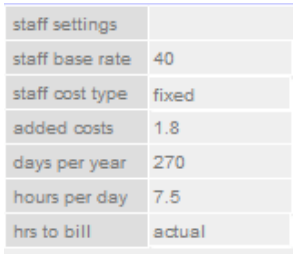
You can also set company mark ups for individual clients when you start using Traffic if you need to.

Roundup Figure

This affects all calculations within Traffic.
Select 2 if you need to round to the nearest penny/cent.
Select 0 if you need to round to the nearest pound/dollar.

STAFF SETTINGS

The staff settings provide the background figures for staff costs. When individual staff costs are added in the Administrator, Staff area, these Staff Settings may affect those figures.



staff settings	
staff base rate	40
staff cost type	fixed
added costs	1.8
days per year	270
hours per day	7.5
hrs to bill	actual

Staff Base Rate

This figure is the amount per hour an average staff member costs. Individual salary information can be added in the Staff Area, but if no information has been input there, Traffic will use this Base Rate figure to calculate all your staff costs for hours logged against a job.

Staff Cost Type

This setting calculates the cost of your staff for the work that they do. The recommended setting is fixed, which generates a cost of work based purely on how many hours of work are logged.

This setting may be changed in the future if you wish to make a further definition between staff who are paid by the hour, and those that are salaried. If set to ‘calculated’, the cost figure will be calculated by the day rate divided by the number of hours worked that day.

Added Costs

This figure is what you need to multiply salary by to reach a realistic total cost of employment (including national insurance, pensions, building overheads, etc.). A typical setting is around 1.8 or 2.

You can leave this blank, which will mean you do not factor anything else (i.e, except the wages paid to staff) into your outgoing costs reports.

Days Per Year

This is the typical number of days worked per year. A standard figure is 253.

Hours Per Day

Input the typical working hours per day. Typical settings are 7.5 or 8. This has an effect on reports that take into account how much work can be completed in one working day.

Hours to Bill

Choose Actual if most clients ask you to bill to the actual number of hours worked. Choose Estimate if you typically bill clients the estimated hours for a job. The setting chosen here is a default, and will not prohibit you from making this decision for individual jobs if necessary, so choose the one that seems to suit your studio overall.

Default terms

This area lets you set a global figure that you quote on all your invoices as payment terms for clients.

Next…numbers
Changes the incremental numbers being assigned to various records in Traffic such as projects. Contact Sohnar Support before attempting to change these.

Invoice Settings

Invoice numbers
This applies to how Credit Notes will be numbered in Traffic. Choose *single* if you wish credit notes to take the next sequential number that an ordinary invoice would get. Choose *independent* if you wish Credit Notes to use a separate numbering system to other invoices.

Leave account package id, and any reference to accounts software alone unless instructed to fill in by Sohnar Support (refers to integration with account software.)

Forecast allowance
A special setting for an optional module to Traffic called Cashflow Forecasting. This is not covered in this manual, contact Sohanr Support for an explanation of this.

Traffic Licenses

This shows the number of Traffic licenses purchased. There are different types. No action is required here.

Support Expiry

This shows the date when your Traffic support runs out. No action is required here.

Client licences

Only applies if Client Module has been purchased.

SALES CYCLE

The Sales Cycle area of Administrator is for storing lists of Sales Stages and Opportunity types which can be selected when creating/updating sales opportunities. You don't need to fill these out if you are not using the Sales area of Traffic.

To input your own sales cycles:
Click into the Description box for the row number you need to add/amend. Type the stage name required e.g. 'cold call', and then a further description if desired.

The list of sales stages may now be viewed in the Sales area when creating new sales opportunities.

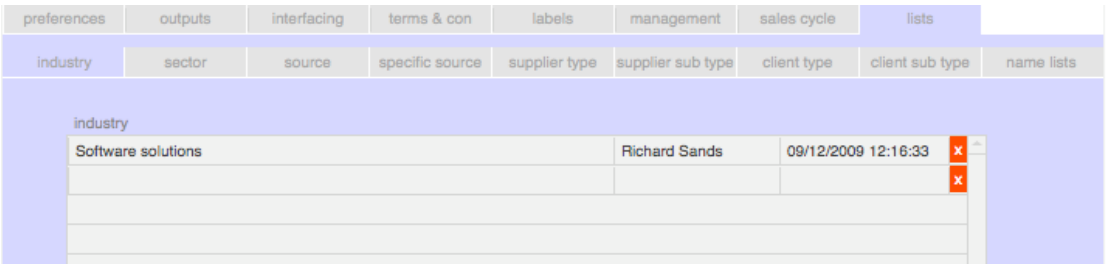
When you are viewing the Sales Cycle tab, an additional tab called Sales Types becomes available. Sales Types are used to form the list showing the types of sales opportunities that can be selected when a new sale is created in the system.

To add a new sales opportunity type:
Click into the grey box for sales opportunity type.
Type the name for the sales opportunity type.
This will now be available in the Sales area to select as the opportunity type.

Note: The columns headed "conversion" and "sales number" display information on sales opportunities once you have started entering them.

LISTS

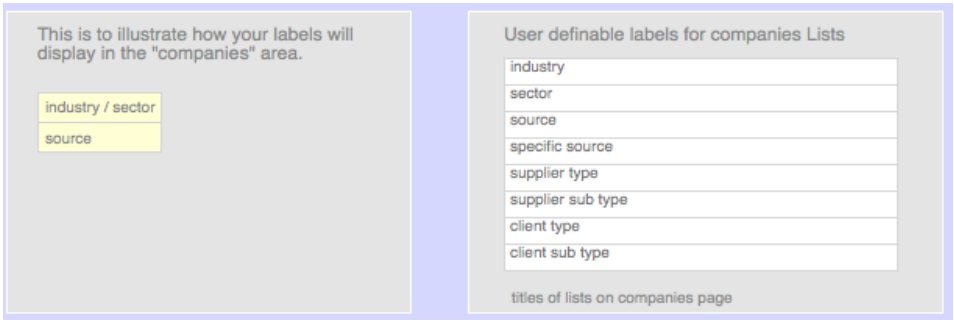
This area is used to pre-set the values that appear in the drop down menus of the Companies Area of Traffic. Here you can manage the terms used for Client Type, Supplier type, and so on.
Clicking the "lists" tab opens a further set of 9 tabs , where you can add to or change these options. Here we have selected the "industry" tab;



Simply type the terms you wish to use into the empty lines within this area and these will appear in your company type drop down lists (in Companies).

Industry – Area of business the company is in
Sector – Sub definition of industry
Source – How you first came into contact with the company
Specific Source – Detailed definition of source
Supplier type – What the supplier does
Supplier sub type – Further detail on supplier type
Client type – What the client does, or type of client they are
Client sub type – Further detail on client type

Name lists



Here you can alter the names of the categories. Note that if you change industry, sector or source, your new choice of name will be visible in the company records area (The other names are not visible)

Change industry/sector/source:

Company view:

Note that Source and Sub-Source can be linked: After adding a source, you can selected it under Specific Source (by using the drop down list headed “parent source”) against each entry.

Note: We recommend setting one blank line entry in each category (by typing a character space and nothing else). By doing this you allow users in the Companies area to set the field back to empty again if they simply wish to take away any previously chosen option.

Divisions

Your organisation may be broken down into divisions. Most organisations, however, will have only one division set up in Traffic. A default division 1 has been set up. Many of the options may be set in System Settings and Divisions. The options you select in Divisions will override those set in System Settings.

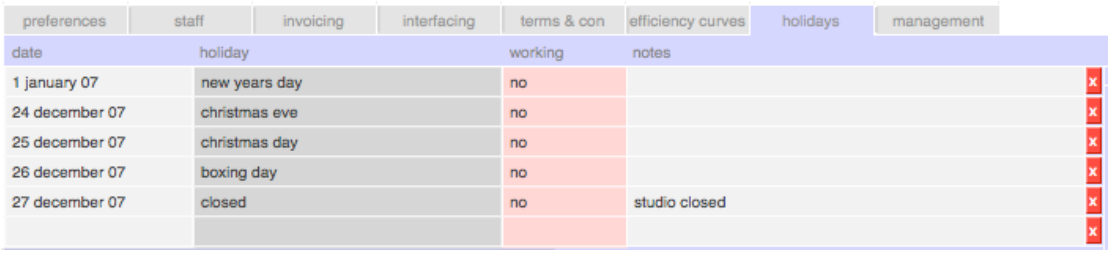
To access Divisions, click on the icon underneath the main dashboard in the Administrator area.

If your business has Traffic with ONE division, you do not need to access any of the following tabs: Preferences, Staff, Invoices, Interfacing, Terms & Conditions, Efficiency Curves, Management.

Please do not alter information under these tabs unless specifically asked to by Sohnar Support staff.

Holidays

The Holidays area ensures that Traffic has information about non-working days. This may be particularly useful when scheduling work, as days added here will be skipped automatically when schedules are created.



To add a non-working day:
Click into the first empty box under the date field.
Type in the non-working day, using the selected date format e.g. 03/03/07.
Type the reason for not working on that day under the holiday field e.g. Bank Holiday.
Type No under the Working heading.
Add any notes required.

STAFF

The Staff screen is where you enter details of all your staff. Some of this information is confidential and should only be entered or accessed by an appropriate member of staff. When Traffic is installed access to this area will be restricted.

To access the staff area, click the staff

icon:

Add Staff

To add a new member of staff:
Click on the new staff button (top left of the screen).

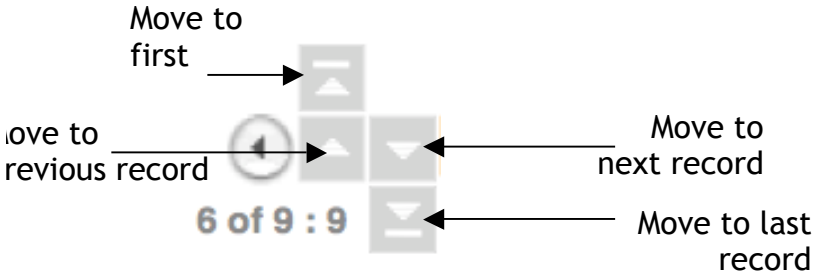
You will be asked for first name, surname and division code. The division code is the number of the division. If you only have one division, the code will be 1.
Complete as much of the rest of the details as you think you will need

name	Sarah	Golding	phone		extension	
job title	Junior Designer		mobile		code	SG
role	Designer		fax		division	1
department	Print Design		email	sarah@traffic.com		
team (leader) ☐			home address			
occupation			start date		employee type	
specialisation			end date		date of birth	
discipline	Artworker					
diary layout	Diary with Calls					

Areas requiring special attention:

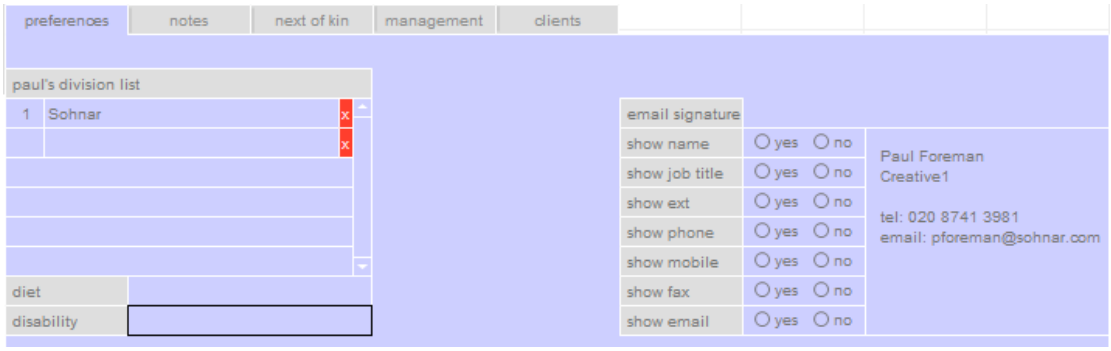
Team leader – Mark an 'X' here for any staff who will be taking responsibility for creating and managing projects.
Role – Staff members' position/skill within the company. Used to assign staff names in scheduling.
Department – Staff members' department within the company. Used to view staff members under department headings on the drag and drop and Smart Schedule chart.
Discipline – Staff members' skill or responsibility within the company. Used to sort staff on Work Requests studio manager's chart.

Once you have got more than one staff record and you wish to review them, you can use the navigation buttons at the top left of the screen to move forward or backwards through them.



Preferences

The preferences area shows:
List of divisions the member of staff is a member of.
Diet
Disability
Email signature requirements
You should not need to make any changes here before you begin to use Traffic, apart from setting up the preferred email signature.



Notes

This area is optional, and for storing information only.

Next of Kin

This area is optional, and for storing information only.

Management

Information under the Management tab may be confidential.

Salary
Type in the annual salary for the member of staff. This may be used to calculated staff costs for a job.

Currency
Choose the default currency for the member of staff.

Hourly rate
This will be automatically calculated by Traffic when you input salary, working days, and hours per day values. If salary is left blank you can input an hourly rate manually. If you put in neither a salary nor an hourly rate, Traffic will base staff cost calculations on the Staff Base Rate figure that is stored in the main Administrator Management section.

Day Rate
This may be automatically calculated by Traffic by inputting salary and working days. Alternatively, you may input a day rate.

Working days
Input the number of days worked annually by the staff member.

Hours per Day
Input the typical number of hours in the working day. A typical setting would be 7.5 or 8.

Tax Number
Input the tax number for the member of staff.

Fee Cost Type
Choose Fixed if the member of staff is paid by the hour. Choose Calculated if the staff member is salaried.

NI Number
Input the National Insurance Number for the member of staff.

Charge Out Rate
Not currently used.

OPTIONAL FIELDS

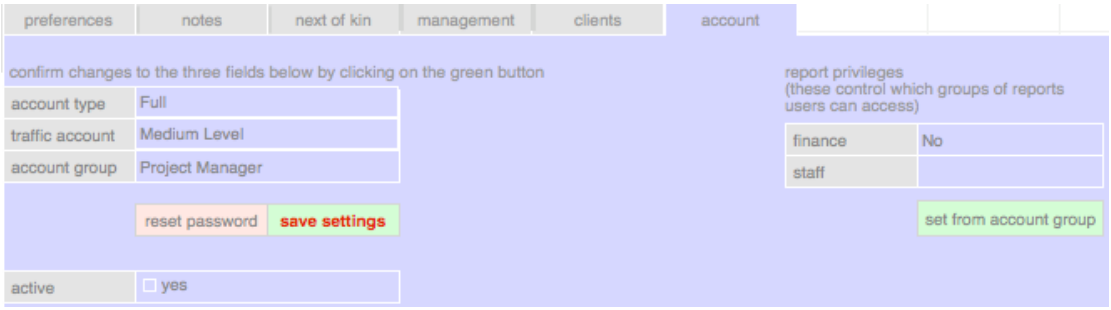
Holidays
Type the number of days holiday the member of staff is entitled to in the current year. Then use the plus button to count down from the starting figure every time holiday dates are used up

Sick Leave
This field is normally used to input the number of days sick the staff member has taken that year. Use the plus button to increase this figure every time a staff member is off sick.

Next Review
Input the date for the next review (appraisal) for the staff member.

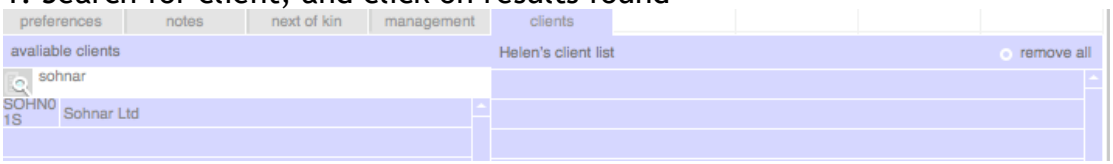
Review Notes
Use this area to input notes from reviews or appraisals. Review notes have to be saved (click “save” to the left), and then you can add new notes as time goes on, and browse through older reports by using the “previous”, “next” and “last” buttons to the left

Account
Use this area set the correct level of access to the Traffic system. Because of the importance of this section, it will be looked at in detail in a separate section on “Account Groups”, at the end of this manual.

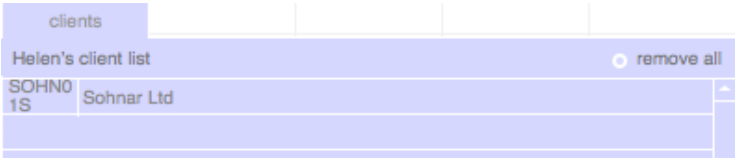


Clients
Lists the clients for the staff member. You can use this to create teams of staff, if you know that the same set of staff always work on jobs for certain clients. To build client lists, first search for client names on the left hand side of this area, and select from the names found in the blue list to add them to that staff member record.

1. Search for client, and click on results found



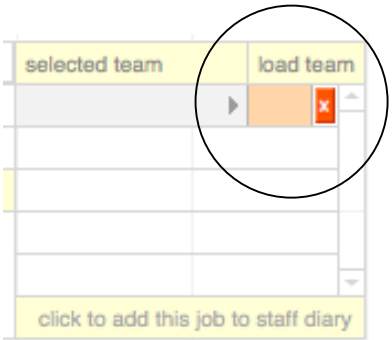
2. Client added to staff members record



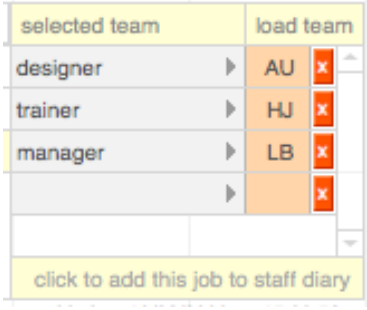
Repeat for each staff member. You can use the “import all clients” link on the far left to automatically load every client into a staff members client list. Please note that client names cannot be removed individually once added, but you can remove all clients and start again, by clicking “remove all”.

Now for any projects for clients that have teams of staff stored, you will be able to use the load team function in the Job screen.

At the main job screen, instead of selecting team members individually, click the “load team” button on the top right.



In our example we added Sohnar as a client to three staff members in the admin area. Because this is a Sohnar job, the three staff members get automatically loaded as a team.



Job Types

To access the job types area, click the Job Types icon.

Here you can create Master Job Types, which define the areas that you work in. Then you can create profiles under each master job type. Profiles are collections of jobs, stages and tasks with associated numbers of hours and hourly rates. In other words, they are pre-built estimates for types of work that you do frequently.

Before you can build profiles, you must set up the chargebands, master job types, master stages and master tasks.

Chargebands

Traffic's estimating system is based on chargebands. These are costs per hour for the different types of work you bill for.

job types | profiles | chargebands | cost spec types

band	description	client code	nom code	currency	rate 1	currency	rate 2	currency	rate 3	currency	rate 4	currency	rate 5	
A	Consulting			GBP	120.00	EUR	140.00	USD	220.00	AUS	200.00			x
B	Creative			GBP	90.00	EUR	112.00	USD	180.00	AUS	180.00			x
C	Programming			GBP	150.00	EUR	300.00	USD	300.00	AUS	300.00			x
D	Project Management			GBP	70.00	EUR	60.00	USD	140.00	AUS	140.00			x
E	Production			GBP	85.00	EUR	160.00	USD	170.00	AUS	160.00			x
F	Misc			GBP	50.00	EUR	100.00	USD	120.00	AUS	100.00			x

To add a new chargeband:

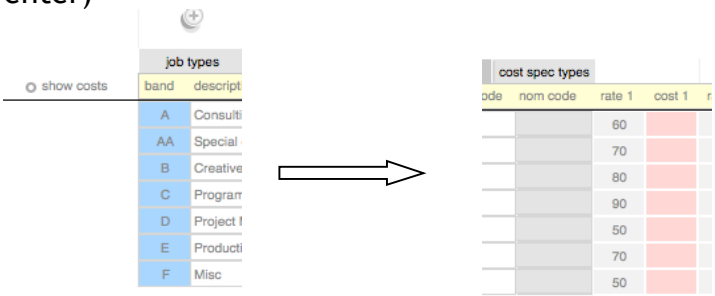
new

Under the Job Types section, click the 'chargebands' tab.
Click the "+" sign at the top of the screen.
Input the details for the new chargeband. Give the band an identifying code (in our example, a letter of the alphabet).
Next add a description of the work the chargeband will be used against.
Set a currency and value for each chargeband. If you work in more than one currency, add additional currencies and values for each currency you work in.
Chargebands can be added, amend or deleted at any time.

Chargeband costs

If you wish, you can also set up a cost for each chargeband so that the system records how much your staff costs are (typically) for each billable rate. To do this:

1. On the chargebands screen, click the radio button called “show costs” on the left hand side of the screen to display a column on each charge band line called “cost” (numbered 1, 2, 3 etc for each currency you may want to enter)

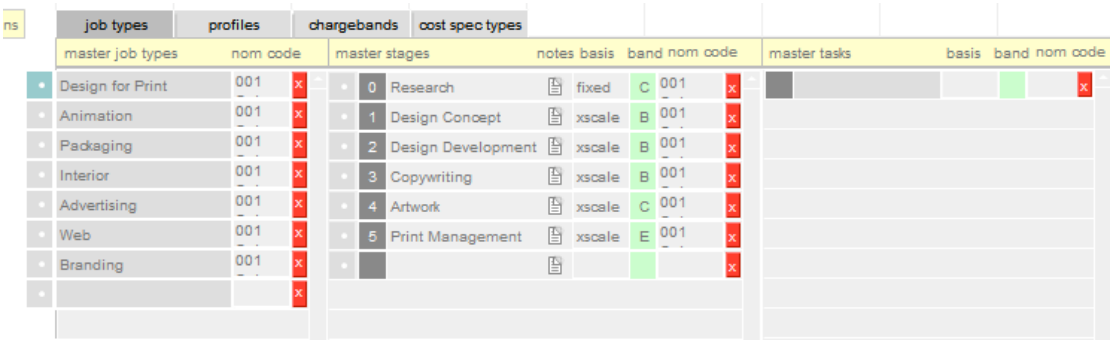


2. Enter a figure in the “cost” column to reflect how much this type of work would cost to do in your company, when you use the chargebands in estimates.

3. When you have finished, click the left had side radio button again to return to the normal view. Figures set in here will show up on reports that have a field for “estimated staff costs”, so that you can see a provisional value of costs even before you have allocated staff names to stages within jobs.

Master job types

The master job types are the basic building blocks from which the estimating and scheduling functions of Traffic are constructed. Job types are your main design disciplines, for example design for print, web design, etc.



To enter a new Job type, click the plus button “add new job type” This will create a line called ‘New Job Type’ which you will then need to re-title. This master job type will be used to create profiles, so you now need to build the master stages and tasks of this job type by adding them in.

Master stages

Each job type could include any number of stages.
To add these, first ensure that the Job type you wish to work on is selected by having the square button clicked beside the name. Then start adding your master stages to the central area of the screen, one by one. Name each stage and add a chargeband for each.

Master tasks

You can also build master tasks against any stages that you need them. To do this, remember again, to ensure the correct stage is highlighted first, and then fill in any tasks as required to the right of the stage. These tasks must each have a name and chargeband associated with them.

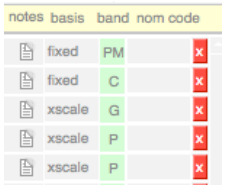
Format and iteration options

You'll also need to name the format or profile label in the lower left corner, and decide what the iteration label will say.

The profile label allows you to store profiles for the same type of work that vary by format (e.g. a leaflet could have separate job profiles for A4, A5 and A6 formats). So depending on job type, format names could be 'size', 'complexity', 'shape', etc.

The iteration field is used to increase hours for any stages that you set as variable cost. So as well as choosing a leaflet to be formatted in either A4 or A5, you can also use a second variable value for the amount of work involved if the job is going to be longer or more complex. Suggestions might be 'number of pages' for print jobs, 'number of screens' for web jobs, or 'duration in minutes' for animation, and if time taken on stages or tasks of a job will vary depending on factors such as these, you can now make this distinction.

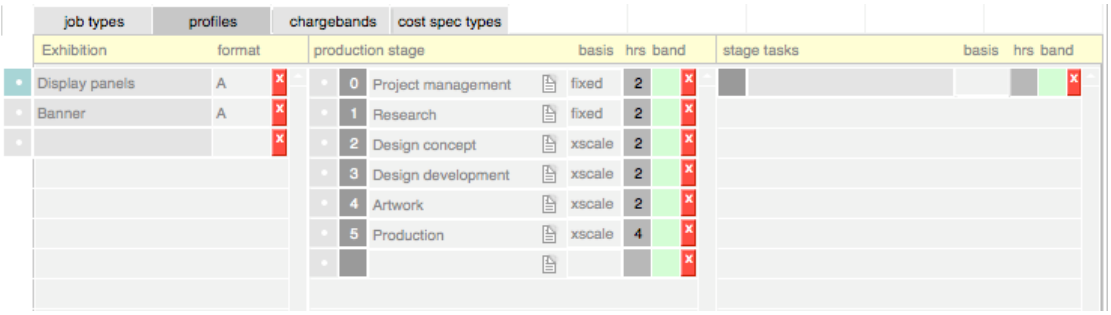
For each stage or task that will vary, set the value under the column marked 'basis' as "xscale". For those that would take the same amount of time to do regardless of the iteration value, mark the basis as "fixed".



Note: If you are not sure how this will affect your use of the system, mark all stages and tasks as "fixed".

Profiles

Profiles are the real-life job descriptions, drawing from the job types, stages and tasks which you have already set up. Profiles can be quite specific so that they will accurately represent the number of hours a job is likely to take. Once created, they can be imported into jobs to automatically generate schedules and estimates.



To create a profile:

- Select the master job type by clicking the grey square button on that job type row (Example – Design For Print).
- Click the 'profiles' tab
- Click the plus button at the top of the screen marked 'new profile'.
- When the dialogue box appears, choose 'create new'.
- You'll be given an exact duplicate of the master job type, which you can name by amending the row title which will currently say "new Profile" (Example – Leaflet).
- Beside the name is a column headed 'format' fill in a description of the format you wish this profile to be" (Example – A4).
- Amend the production stages and tasks as required for this type of job.
- Under the column marked "hrs", add the amount of hours you estimate each stage or task will take. This is required to calculate an immediate estimate when you import profiles into jobs.
- More stages and task can be added or deleted at this stage without affecting the master job type.

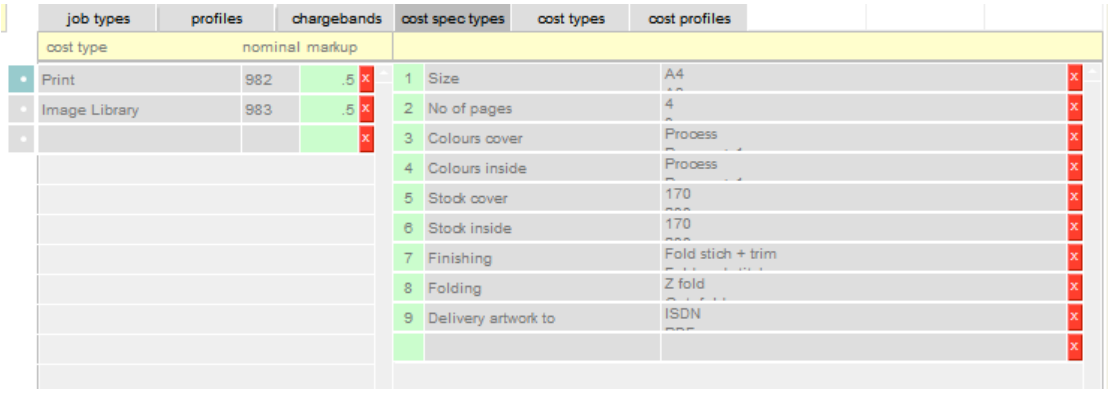
Stage names and colour settings

(Optional) You can set a specific label and colour to the stages of each Job profile, which will show up in scheduling and reports of stages. Use the

colour bar on each stage line to select a pre-named stage title from the list. The name of the stage and an associated colour will be included as part of the profile for reporting purposes. You can also add staff member names to profile stages if you wish, but you may want to leave this and manage staff allocation when you raise individual jobs

Cost spec types

Here you enter details of specifications for work you buy in. This could be pictures from a photo library or printing from a printer. When you use Traffic you will have records of suppliers and the type of work they do for you, so it may be good to set up some specs that match the types of suppliers you use most often.

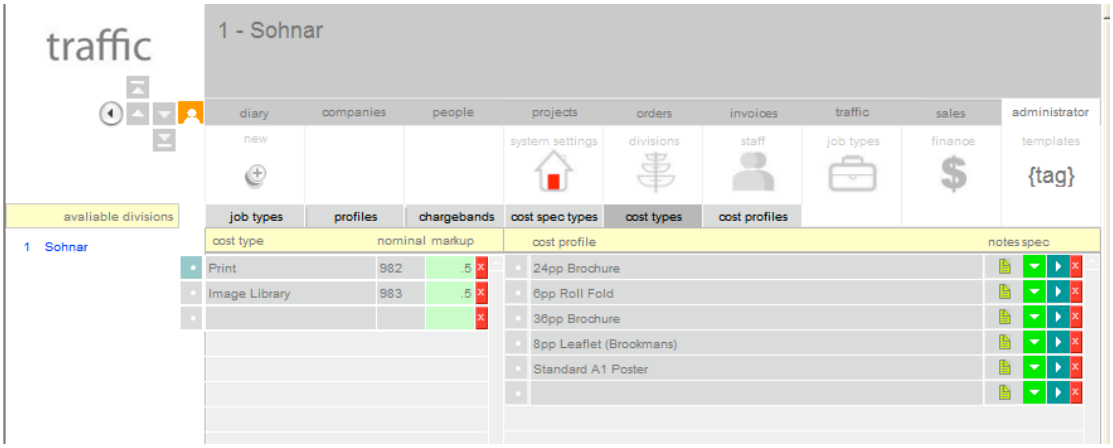


To add a new cost spec type:

- Click into the first free line on the left side of the screen.
- Input the title for the new cost spec.
- On the right hand side, build up as many options as you think you could need for sending such a cost type out to tender. By building in all possible options, you can bring in this ‘master‘ spec when creating tenders, and then omit the ones you don’t need on an individual basis.
- To create lines with multiple options, write your spec name in the first column and then create a list of possible options in the second column, dividing them up by hitting the return key after typing each option.

Cost Types

Cost Types are cost specs with standard details already input for a specific variation. This will save you having to input cost spec details if you often use the same variables of the basic ones. You can use Traffic without setting anything in this area.

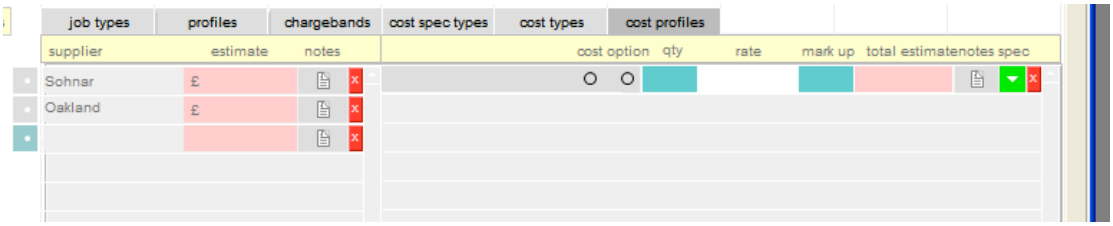


To create Cost Types:

- Click the square select button beside the line of the cost spec you wish to create a cost type for.
- Click the cost types tab and type your description straight into the first free space on the right. When you're happy with the name, be sure to highlight the line by clicking the grey square box to the left of the name.
- Now you can populate the cost type with one of your master specs and then customise it. Click on the bright green box with the down arrow on the right of the row.
- This will open a window from which you can bring in a previously created spec.
- Choose the master spec that suits this type of cost by using the drop down list named "cost type", and clicking "import spec".
- Modify the list that is imported to suit the cost type you're creating, and then close the window.
- Your cost type is now ready to use.

Cost Profiles

Cost profiles are cost types which also includes prices and suppliers. This area is optional and relies on you setting supplier prices and being responsible for changing them as and when it becomes necessary.

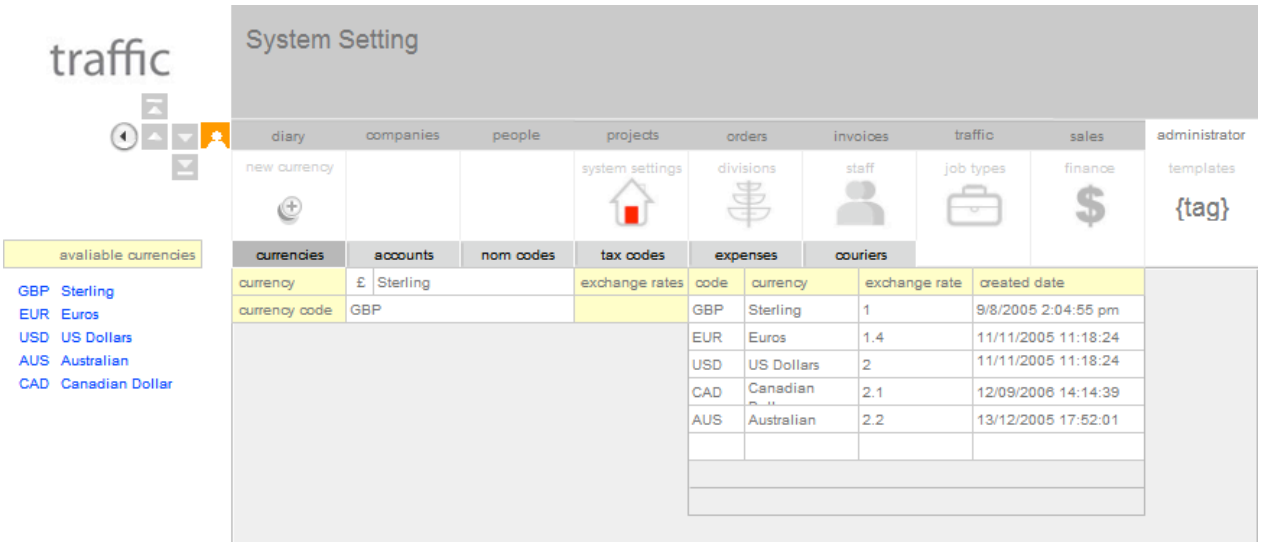


To create cost profiles:

- First of all create a cost type that you wish to make profiles for.
- When the created cost type is highlighted, you can click on the dark green button on the far right of that row to go into the Cost Profiles area.
- In this new area, begin by entering a supplier name in the first available field on the left. After this, make sure the line is selected by clicking the grey square on that line before going any further.
- Leave the estimate field and move to the next available field to the right and type a description of the cost that this supplier offers.
- Use the green square box with a downwards-pointing arrow to open the Spec window. From here you can import the standard spec type and amend it to suit the profile you are creating. You might not require this if you already know the prices this supplier currently charges.
- You can then add the price the supplier does this particular job for, as well as your choice of mark up if required. If you wish you can also build in a series of options for this cost, if the supplier always offers the same options and you'd like to have them available on your estimate each time.
- Your cost profile is now ready to use.

Finance

The Finance Area allows you to set up the default financial information for your Traffic system. This includes bank account details and default currency settings. Normally this is already set when Traffic is installed.



The options you may select are currencies, accounts, nom codes, tax codes, expenses, couriers.

Currencies

To add a new currency to your Traffic system:

Click the Currencies tab.
Select the new currencies plus button at the top left of the screen.
Input a code (e.g. USD), description (e.g. US Dollars) and symbol (e.g. $).
Input the current exchange rates for the currency.

Note: You will need to keep these rates updated yourself.

To amend currency details:

Click the Currencies tab.
Select the currency you wish to change from the left hand side of the screen.
Make the relevant changes to the currency details.
The date of the last exchange rate amendment will be displayed in the system.

Accounts

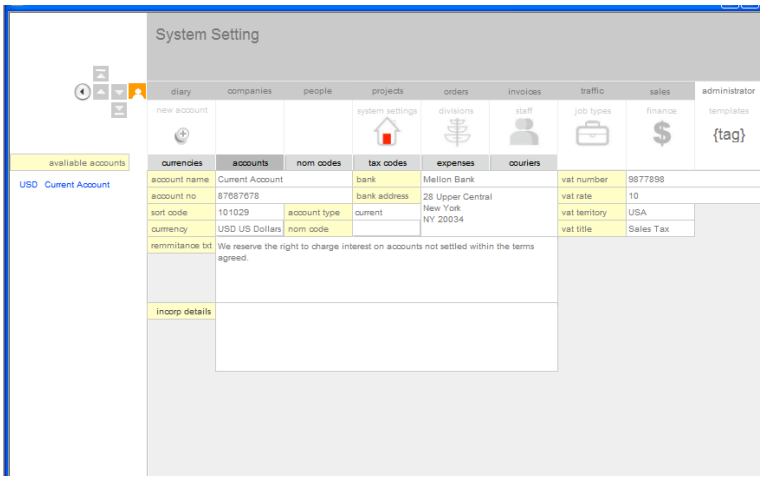
Input all your company bank account details into this area:

To add a new bank account:
Click the accounts tab
Select the new account plus button at the top left of the screen.
Input bank account details.

Account Details

- **Account Name**: input the name of the bank account (e.g. current account)
- **Account No**: input the account number
- **Sort Code**: input the branch sort code
- **Currency**: input the currency for the bank account
- **Bank**: input the name of the bank e.g. HSBC
- **Bank Address**: input the bank address details
- **Account Type**: input the type of account e.g. current or deposit
- **Nom Code**: input a nominal code for the bank account
- **VAT Number**: input the VAT number
- **VAT Rate**: input the VAT rate

- **VAT Territory**: Input the country
- **VAT Title**: The last named field is simply how you wish VAT to be shown on invoices. For instance, the equivalent in New Zealand is GST, and in France it is called TVA.
- **Remittance Txt**: This could contain details of how your customers can pay you — e.g. a BACS or IBAN reference. This text may be included on your invoices.
- **Incorp Details**: Complete with information on registered office, company registration number, etc.

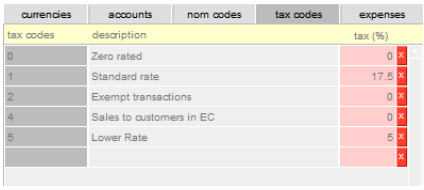


Nominal Codes

Nominal codes are codes accountants attach to each type of sales or purchase item. They group accounting items in a clear way. These codes also form the basis of communication between Traffic and accounts packages such as Sage and MYOB.
You need to build a library of nominal codes if you wish to connect Traffic to an accounts package.

Tax Codes

This area lists all the tax codes set up on the system. You can add additional tax codes, delete codes you do not use or make amendments to the existing codes. For instance, the main VAT rate is 17.5% in the UK but educational establishments pay 10% and some goods, such as books, are zero-rated.

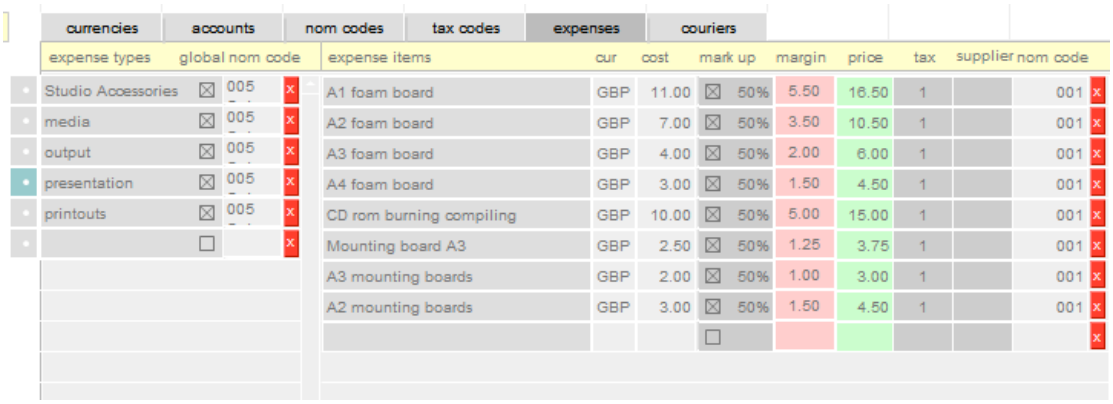


Tax Codes and Nominal Codes are very important if you plan to link Traffic to another accounts software package. You will have specific help with this feature from Sohnar support staff if you are linking up systems in this way.

Expenses

This area allows you to set up expenses for your Traffic system. These expenses may be used while creating estimates in the Projects area.

Expenses are internal costs, which are normally chargeable to a client. An example would be using up blank CDs or DVDs.



To add a new expense:

- Click the plus button marked “new expense” and enter a name in the first blank expense type field, e.g. consumables.
- If the expense type is to be used throughout the company, click the **global** checkbox. If it is only going to be used within the division, leave it unchecked.
- With the expense type selected (the **selection** button on the left is green not grey), enter as many expense items of this type as you require under “expense items”. If your expense type happened to be presentation, your items might be foam boards or mounting boards, etc.
- Next, enter currency and cost to your company for each item per unit.
- The **mark up** field has two parts, a checkbox and a mark up percentage. If the checkbox is not selected, the item will be charged

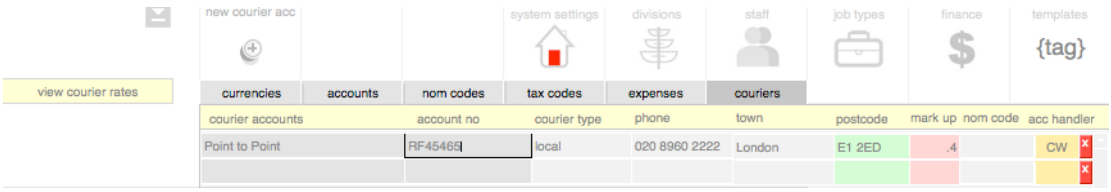
at cost, even if you do enter a mark up. The markup will be read as a percentage, so for 50% type .5 into the box.

- The next two fields are calculated automatically from the cost and mark up fields you have already entered.
- Enter tax code, country and nominal ledger code if required.

Couriers

The couriers area allows you to add rates for your courier companies This can only be filled in if you have a company set up as a courier in Traffic. To do this simply enter the company and mark them as a supplier with the type set as “courier”.

Creating Courier accounts
In the couriers area, click on the plus button marked “New Courier Acc”. A pop up window will present you with the names of any company set up as “couriers” click on the name of the company you wish to select.
A new line will be created in the courier area and you can enter account number details in here. Other details will come through from the company record if they have been filled in.



Now you need to create some service options for this courier.

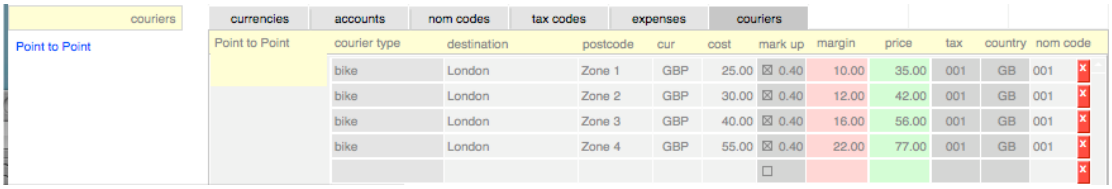
Click on the link on the far left of the screen marked “view courier rates”.

Couriers with created accounts will be listed under this header on the new screen. Highlight the name of the one you wish to create rates for.
First enter a description on the service they offer under the “courier type” header. Normally this would be something like “Van” or “Bike”. This term will be used later when you wish to add a courier order to a job.
Now fill in the destination and postcode fields with the commonly used destinations that you use this courier for. Examples might be “City Centre/ Zone 1” or “City Name/Postcode.

Note: Only the second field “postcode” will be visible when you order a courier at the job screen so make sure this information is suitable. You do

not have to write a postcode here if you prefer to have a different term displayed.

For each destination listed, enter the price the courier charges for that trip. You can use the mark up option to calculate the amount that will be billed to your clients.



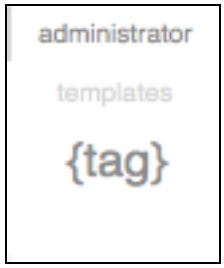
Enter as many rate lines as you need, and then create more line items for other courier types if needed.

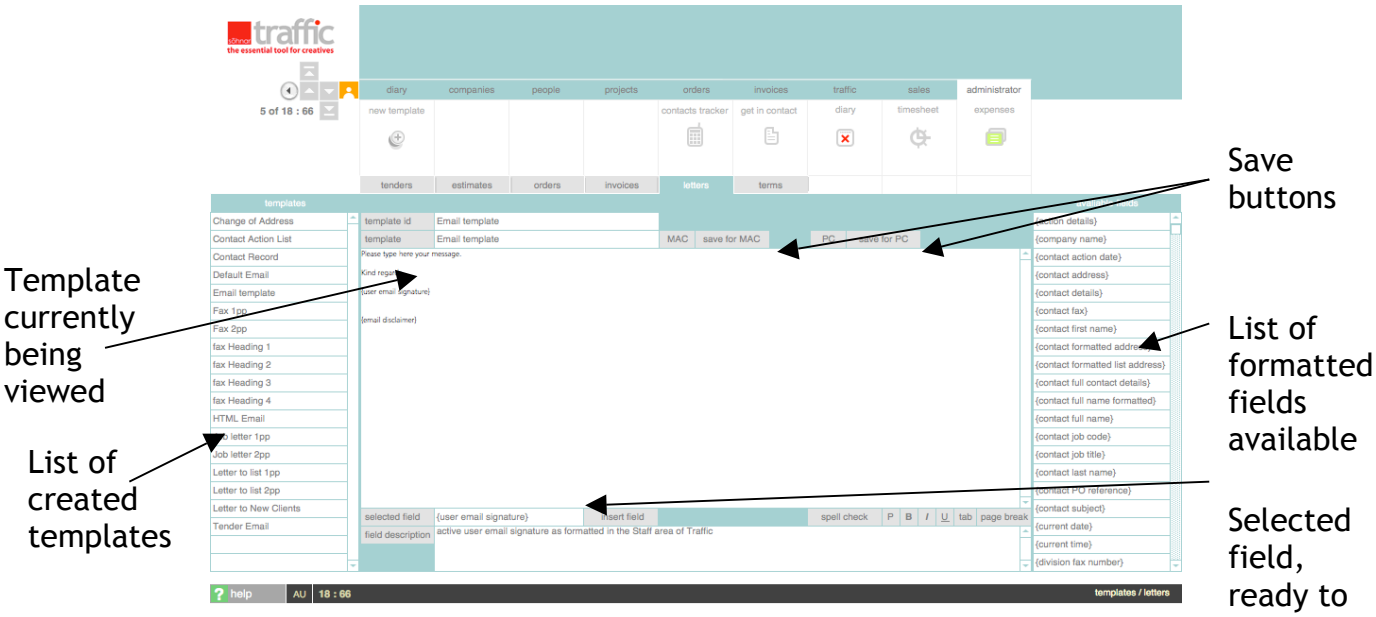
Note: You can still use the Courier option even if you do not enter any figures in the fields, as the price can be entered manually at time of order.

Templates

You can create and use various templates in the Administrator part of Traffic. These can be used whenever you create a contact record, and are particularly useful when sending out emails or creating letters.

To access the Traffic templates, first click on the main Administrator tab, and then click “tag” directly underneath it.




Save buttons
Template currently being viewed
List of formatted fields available
List of created templates
Selected field, ready to insert

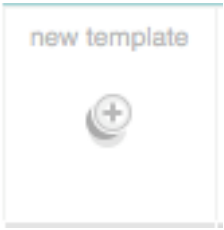
In here go straight to the section called “letters” on the bottom half of th screen. The other tabs in this section are marked “tenders”, “estimates”, “orders” “invoices” and “terms”. These are used by Sohnar to set up your Traffic documents and should not be amended.

<u>The “letters” templates</u>
You can see all the current templates listed on the left. On the right is a list of fields that can be used to bring auto-formatted text into templates.

These include details of the person you are writing to, details about date and time settings, and details about the person sending the message.

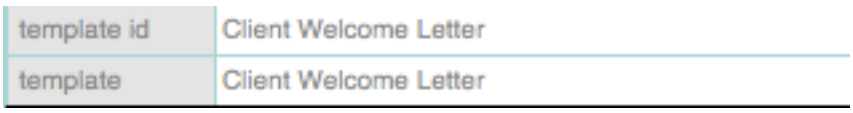
Adding New Templates

You can create new templates by following these simple steps.
First, click the plus button at the top left of the screen called “new template”

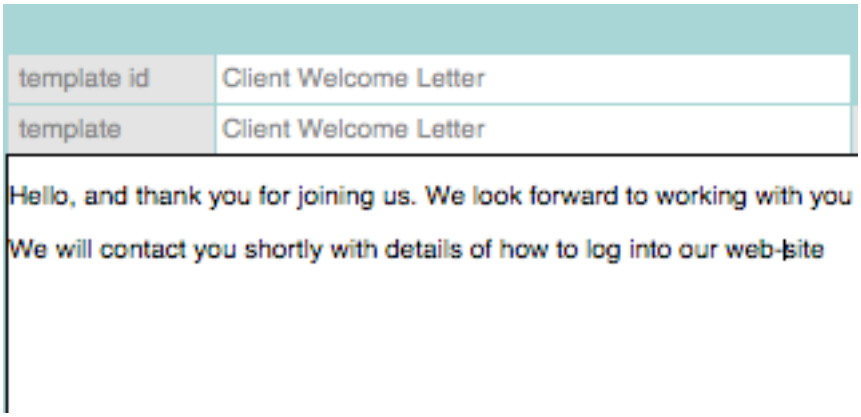


You will be shown the id number of your new template and an empty screen for you to create it in. First give your template a name.

Type the name into the window marked “template” and then paste this name over the “template id” number (which is not required), so that both windows are the same. It is also possible to leave the template id as it stands as it is not visible elsewhere in the system

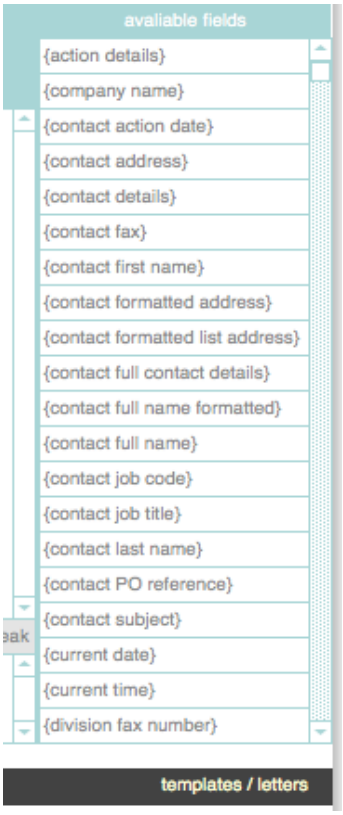


Now you can write the body of your template in the area underneath.


template id
Client Welcome Letter
template
Client Welcome Letter
Hello, and thank you for joining us. We look forward to working with you
We will contact you shortly with details of how to log into our web-site

Adding formatted fields to a template

If you wish to add any fields that will automatically personalize or bring in pre-set information, you can add formatted fields to the template. Over on the right is a list of all formatted fields available to use in templates.



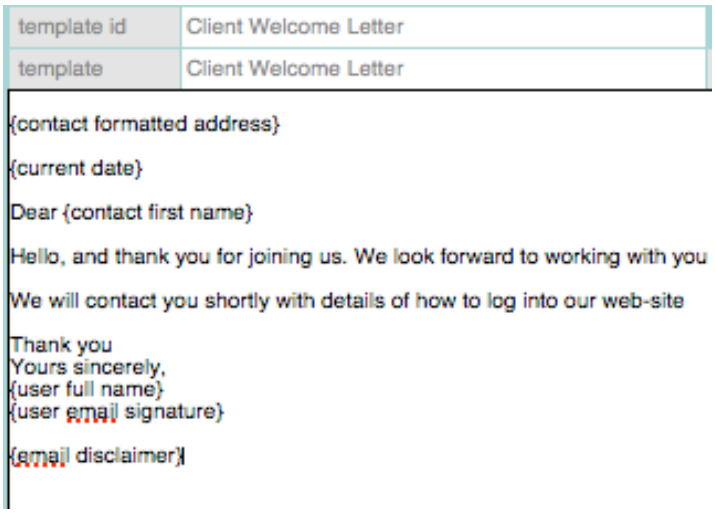
You can use any formatted field in this list in your template. Adding a new field is done as follows:

1. Bring the template you wish to amend onto the main screen.
2. Select the field you want from the list on the right by clicking on it.
3. The selected field will now be displayed underneath the main window. Here you can also see a brief description of the formatting.

4. To add the field to your layout, put the cursor on the page where you would like the field to be inserted.

5. Now click the box marked “insert field”. The field will go onto the layout at the place where your cursor was set.
6. Add spaces or tabs as required on the central layout area. Do not delete any parts of the formatted fields. If you type text directly into the layout area this will become part of the template too.

Here is an example of a letter using several formatted fields.


template id
Client Welcome Letter
template
Client Welcome Letter
{contact formatted address}
{current date}
Dear {contact first name}
Hello, and thank you for joining us. We look forward to working with you
We will contact you shortly with details of how to log into our web-site
Thank you
Yours sincerely,
{user full name}
{user email signature}
{email disclaimer}

In this example we have created a template that will pull through the client’s name and address (in the formatted fields, “contact” refers to the recipient of the e-mail or letter), and our own details (which are the formatted fields that refer to “user”). Spacing, paragraph breaks and tabs will be retained when the template is used.

Saving a template

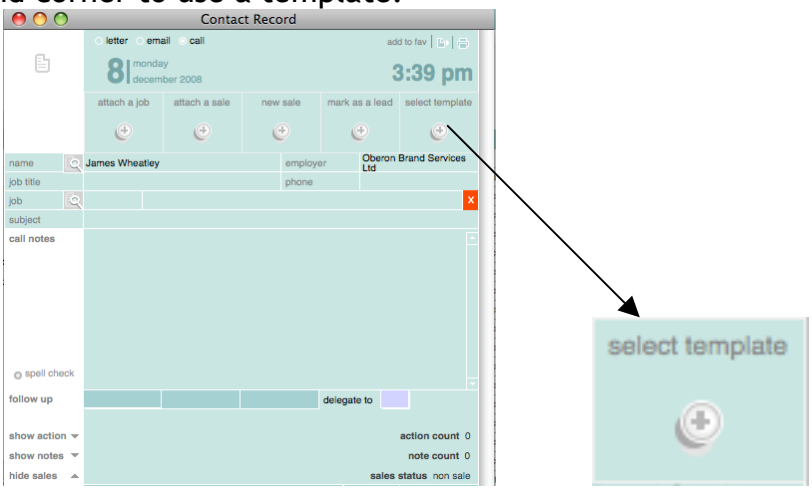
To save the template, click on the save buttons above the text which are marked “save for MAC” and “save for PC”.

You MUST save the template on both Mac and PC if you use Traffic on both these systems. But you can only click “save for…” for the machine type you are currently working on, so you need to save the updated template by clicking “save for Mac” if you have created it on a Mac, and then (when you get the opportunity, or straight away), open Traffic on a PC, locate the template again, and click “save for PC”. This will allow users of both types of machine to use the new template.

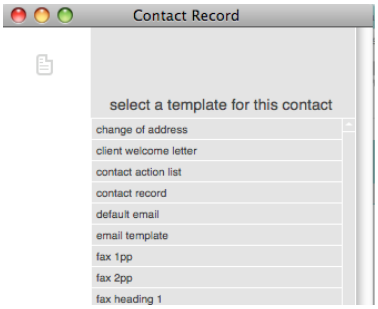
Now when you create a contact record, you can use your template.

Using Templates

After opening a contact record, click “select template” in the top right hand corner to use a template.



You will be warned that templates replace any text already written in the record, so if you wish to proceed, click “Yes” and you will be able to choose from a list of templates.



In our example above, the template called “Client Welcome Letter” is now available. Click on any template name to bring it into the contact record. In our case, the record now looks like this:

As you can see all the correct details have been brought into the formatted fields. We can now over-type or change any details if required, including any that came from formatted fields.

Email signatures

When emailing from Traffic, you can set up a default e-mail sign-off that will got out with all emails without the need to bring in a template each time. The template is created in the same way as other templates, but you should check your email signature and disclaimer details first, which are stored in other areas with the Administrator area of Traffic

To change the personal sign-off: Go to the staff member records in Adminstrator, and you can see the settings for email signature on the bottom right. Select which details to show in the signature by using the radio buttons (you must have details in the staff record to pull through from).

You can do this per user, or globally. The global setting is on the main Administrator screen, click the “outputs” tab to see and amend the settings. These settings will be the default for all users who do not have personal settings created as above.

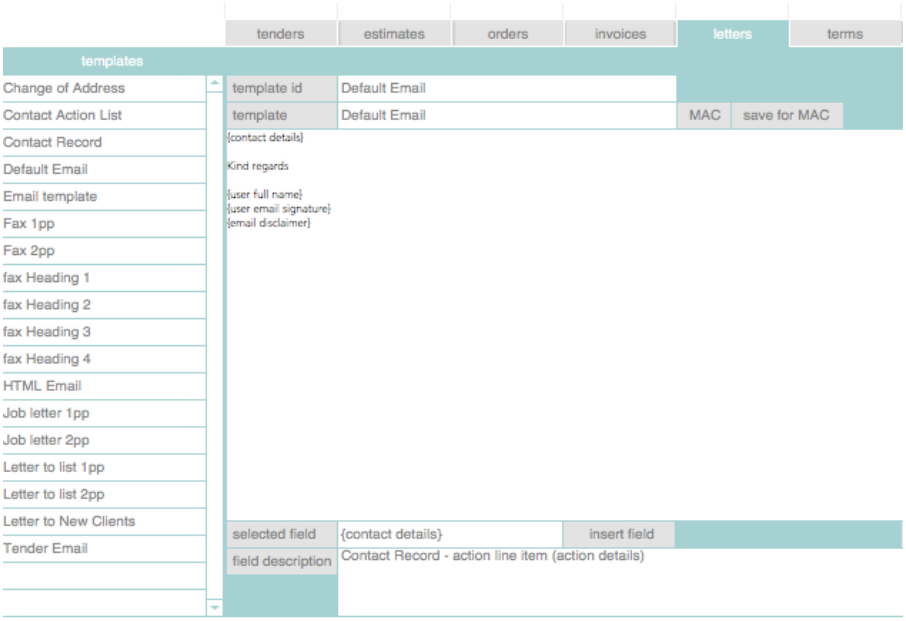
Next, you can also set up or change your email footer. For this, stay in Administrator, and click the “terms & con” tab, which is to the right of the “outputs” one. Under this tab is a section marked “email” and here you can store text to form your email header and footer/disclaimer. Currently only the footer can be used in templates.

Importantly, you need to check your division settings as well. In the Administrator tab there are icons at the top of the main screen, and one is "divisions".

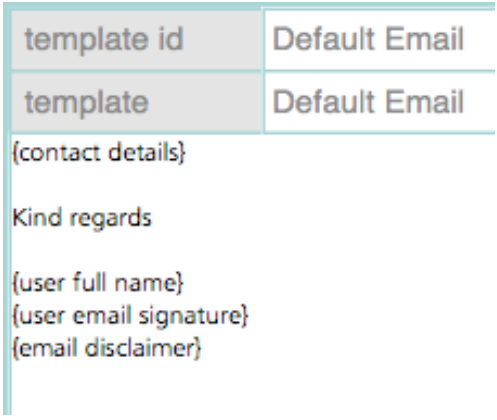
Click this icon and check the "terms & con" tab in here as well, it looks identical to the one above. Make sure you paste the same text into the division area too, as Traffic needs these two areas to be the same, even if you only have one division.

Once you have set up the details, you can make sure all emails are pulling in this text, so click on the main Administrator tab again.

In here go straight to the section called "letters" on the bottom half of the screen. You should have a template set up called "Default email". This is the one that is automatically puts your email details in every outgoing Traffic email. It can be found in the list of templates down the left hand side. Click on it and the contents of the template will be displayed in the centre of the screen.



Ideally, it needs to contain the formatted fields {user email signature} and {email disclaimer}. It will also probably have some others, in particular {user name} - which means the name of the person creating the email - and {contact details} – which means the text you type in when you create the email.

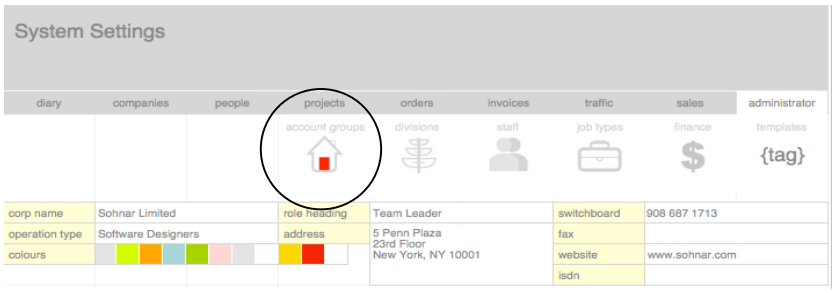


If you wish to add any missing fields you can amend the template by following the same details as listed previously. Remember to save the template (for both Mac and PC if required) when you are finished.

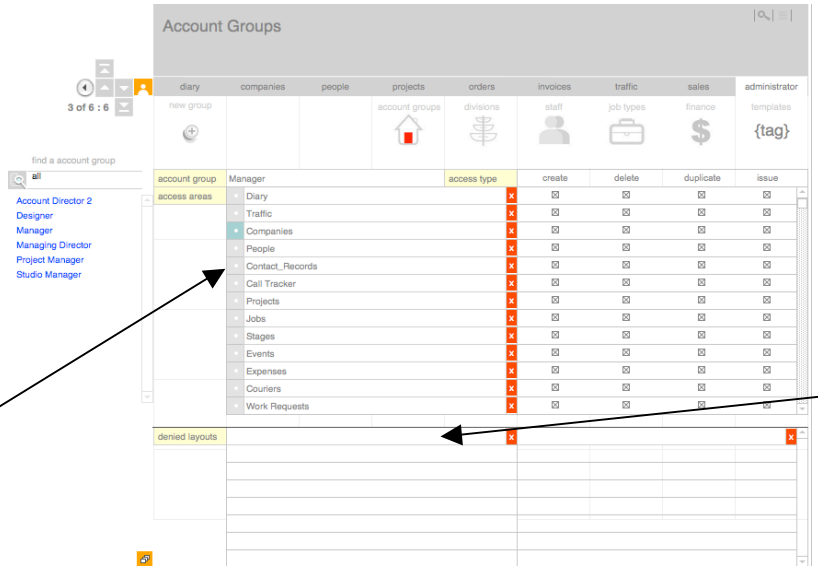
Remember you do not need to use the “select template” function on contact records being emailed to bring in the “default email” details, they are automatically attached when the message is sent. You will not see the details in the contact screen window.

ACCOUNT GROUPS

Traffic has fully customizable levels of access so that users can set exactly what information each user has access to within the system.
The area where these access privileges are defined is under the administrator tab, and then by clicking the icon called “Account Groups”.



The main screen looks like this:



List of accessible areas for displayed level

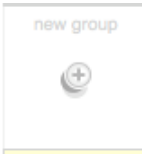
List of denied layouts for displayed user level

When Traffic is installed, there will be some main default levels already set, for example Designer, Studio Manager, Project Manager, Account Director, Managing Director etc (names may vary in your version of Traffic).
These will have basic settings already defined by Sohnar, and you will be asked to pick user levels for your staff at install that match these groups as closely as possible.

Once installed, users with Managing Director access can go to this section and customize these settings as required, as well as creating additional access levels themselves (which they can name in any way they like).

There are several layers of access definitions to set, giving full flexibility to Traffic users.

Add a new access level



To make a new access level, click the “new group” plus button at the top left of the screen, and fill in the name of this user type in the box marked “account group” (above the central table area)

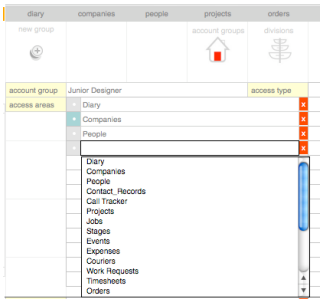
Duplicate an existing access level

Alternately you may find it easier to copy an existing group and just alter it slightly. To do this, first select the group you wish to copy, by searching for it using the quick find window, and then clicking the group name in the results to bring that group onto the main screen. Next, click the duplicate icon at the very bottom corner of the screen.

The duplicate group will now appear, and you should immediately change the name of the group in the “account group” field.

Access Areas

For each access level, you can now set which main screens of Traffic that user has access to. The main areas of Traffic are set per user by using the drop down windows below the account group name. If you created a new group, you need to add areas to that group as required. Each area clicked on will be added to the screen, so just move to the next available line to add more.



If you duplicated a group, the areas of the original group will be copied, so you may be deleting areas rather than adding them (use the red “delete” box on any line item you wish to remove).

If you delete an entire line item, for example, “administrator”

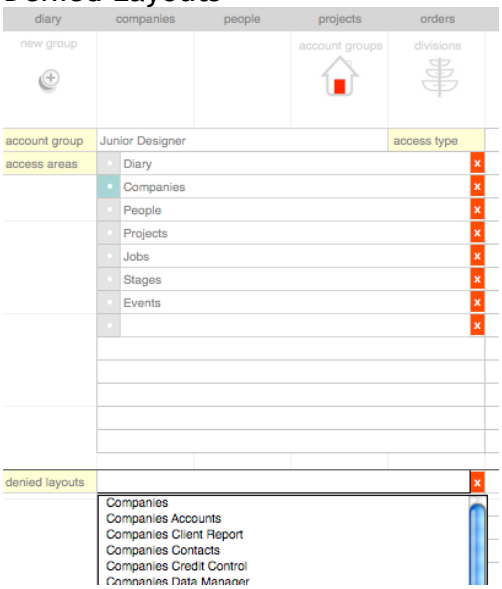
then it means that the user will not be able to click on the tab across the top of the screen.

User settings
Once you have chosen each area of Traffic to be accessed, you need to set the actions that will be allowed for that user group. Choose to allow or block the following four functions:

Create – the ability to add new records to the area
Delete – the ability to delete records from the area
Duplicate – the ability to use the "duplicate" function in that area
Issue – Only affects invoices and orders, and allows users to change the status of these from pending to issued.

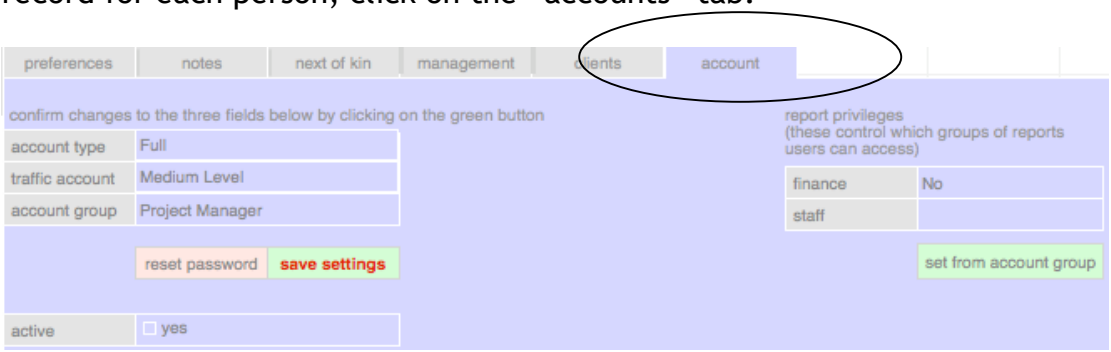
Setting none of these means the access is "read only".

Denied Layouts



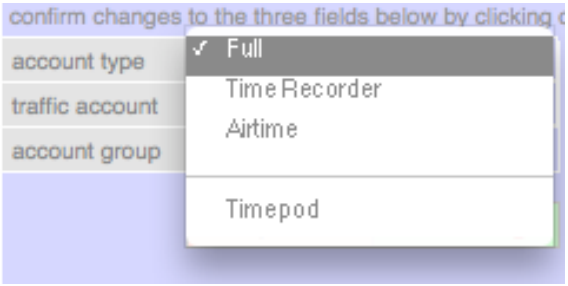
For each main area selected, you can filter out certain layouts that you do not wish that user group to be able to see. The bottom half of the screen allows you to set denied layouts. To set these, first select the Traffic area you are defining by clicking the square 'select" button to the left of the area name. Layouts specific to this area will now be displayed in a drop down list that is accessed in the lower part of the screen. Set any layouts that you wish this user group NOT to have access to.

Assigning Account Groups to Staff
Once you have defined all the user groups you can assign them to your members of staff under the Staff area of Administrator. To set these, click the main Administrator tab and then click on the Staff icon. In the staff record for each person, click on the "accounts" tab.



Setting Traffic Accounts
There are three different settings to set up in this area, so it's important that you know what to select here.

1. Account Type



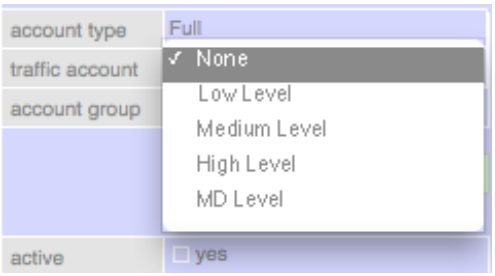
These setting simply decide on whether the full Traffic system is available, or just one of the smaller modules.

Select "Full" for all system users who need access (at any level) to log into the main Traffic application.

Select "Airtime" for staff who are only using the Traffic Airtime calendar and timesheet application (also explained in the "Timesheets" section).

The "Time Recorder" and "Timepod" levels are not in use any more.

2. Traffic Account



These must be set against individual members of staff, but they only affect full users. These levels work in conjunction with the account groups (to be set next), and give a further flexibility to the system.

Therefore, for Airtime users, the Traffic Account should be set to "None".

The five other levels are as follows:

Managing Director – Access to all financial information in all areas including staff salaries. Has two unique privileges: this level allows you to see and edit the "staff salary" field in the Staff area, plus it allows you to modify other users account levels.

High – Access to all financial information with the exception of seeing/adding staff salaries and modifying account groups. High level users can access all other financial data such as chargebands, invoiceable amounts, staff costs in reports, mark ups, and overall profit figures in all reports.

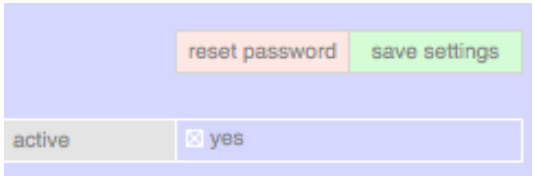
Medium – Access to outward-facing financial information about a job. You could liken this to information that might be shared with a client. This includes estimated and actual figures, but not staff salaries, any job costs or profit or loss.

Low – Cannot see any financial information in areas of Traffic where job costs are set or viewable. This setting is designed for users who do not get involved with creating projects, purchase orders or invoices.
Typically you would set this group for users who only use the Diary, Companies and People, plus timesheets and work requests.

3. Account Group

Finally, use this drop down to set one of the account groups that you have created in the "Account groups" area of the Administrator section, as described above.

When you have chosen the account settings, you must click the green **"save settings"** box to set and save the account.



In this same area you can also simply reset a forgotten password by clicking **"rest password"** (again, the password will be reset to "traffic" at next log in).

The new settings will not take effect until that user next logs in, but it is recommended that you do not change a user's account group while they are logged in and using the system as they will find they get locked out of areas - and they may be in the middle of something!

If this is a new user, also click the **"active"** check box at the bottom of the screen. This assigns one of your Traffic licenses to the user account, taking it from your total number of purchased user licenses. You can switch licenses between staff at any time, but you cannot collectively activate more user accounts than you have purchased licenses for. The system will warn you if you try to activate a new user that will exceed your total number of licenses of that type.

Note that changing user levels on an existing account will reset that persons password to “traffic”. They can change it back to another password at their next log-in.

Report Privileges

This setting allows you to govern access to two specific areas of Traffic: the finance reports and the staff time reports.

Access to reports can be tailored using the settings under the “account groups” area discussed earlier, but this setting lets you over-ride or counteract any other settings within the staff account area itself by making a simple yes/no choice for access to finance and staff reports.

To undo this decision, click the yellow box marked “set from account group” to revert the report settings to those belonging to the account group.

Proof HQ account
The other setting in this tab is the username and password to the user’s Proof QH account. This is only relevant if you have had this extra service enabled by Sohnar Support, and is discussed in separate documentation.